

FIG 1.

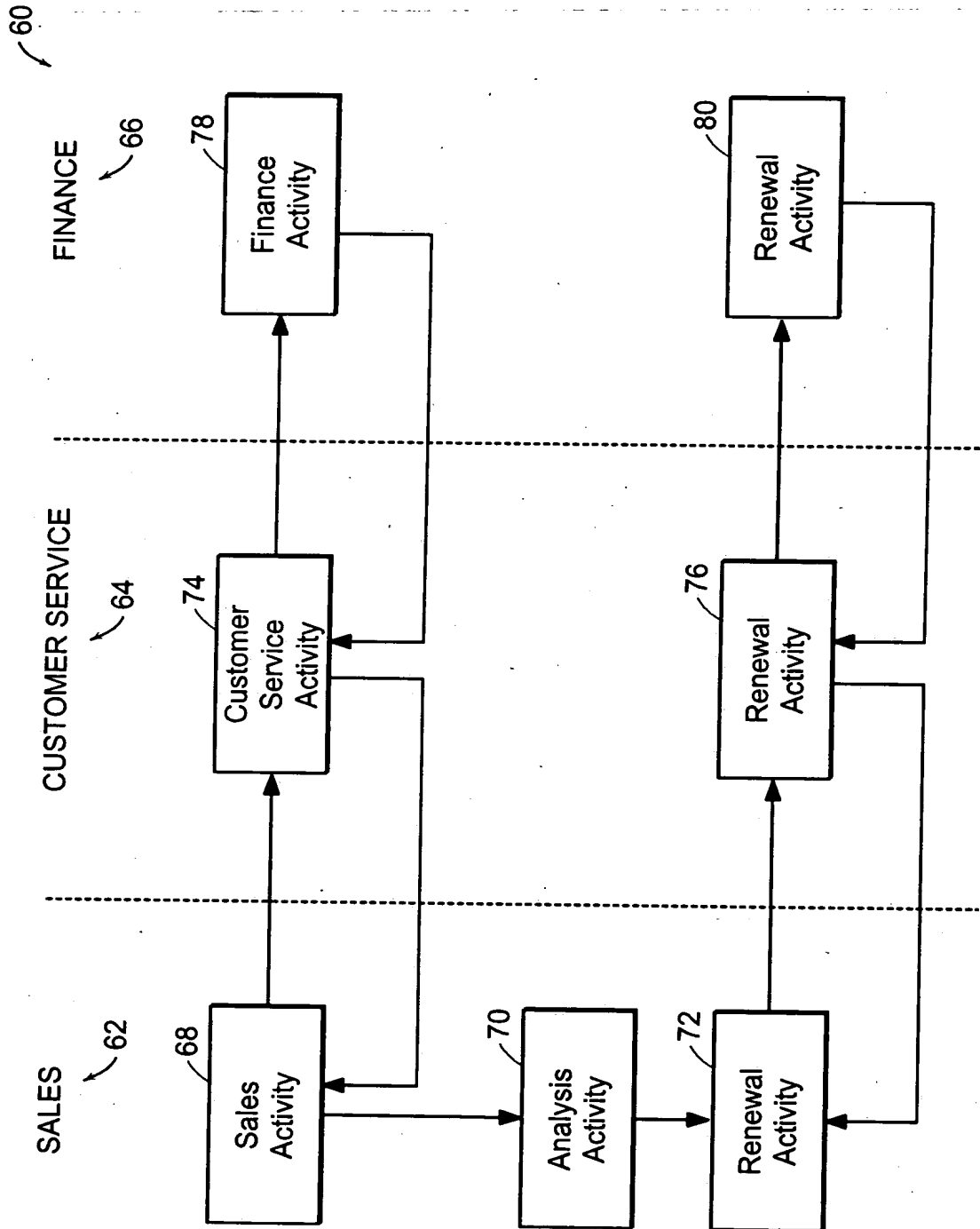


FIG. 2A

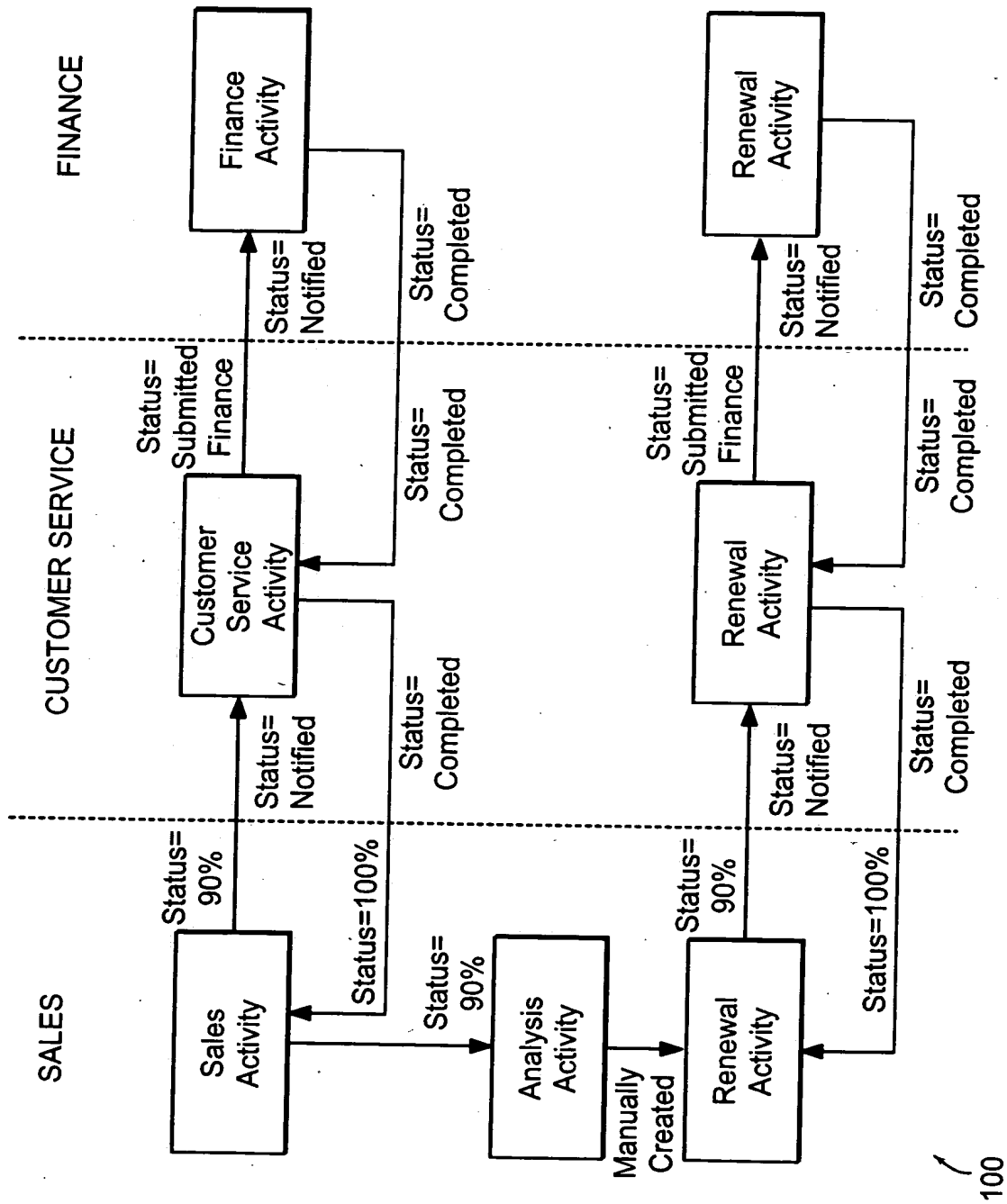


FIG. 2B

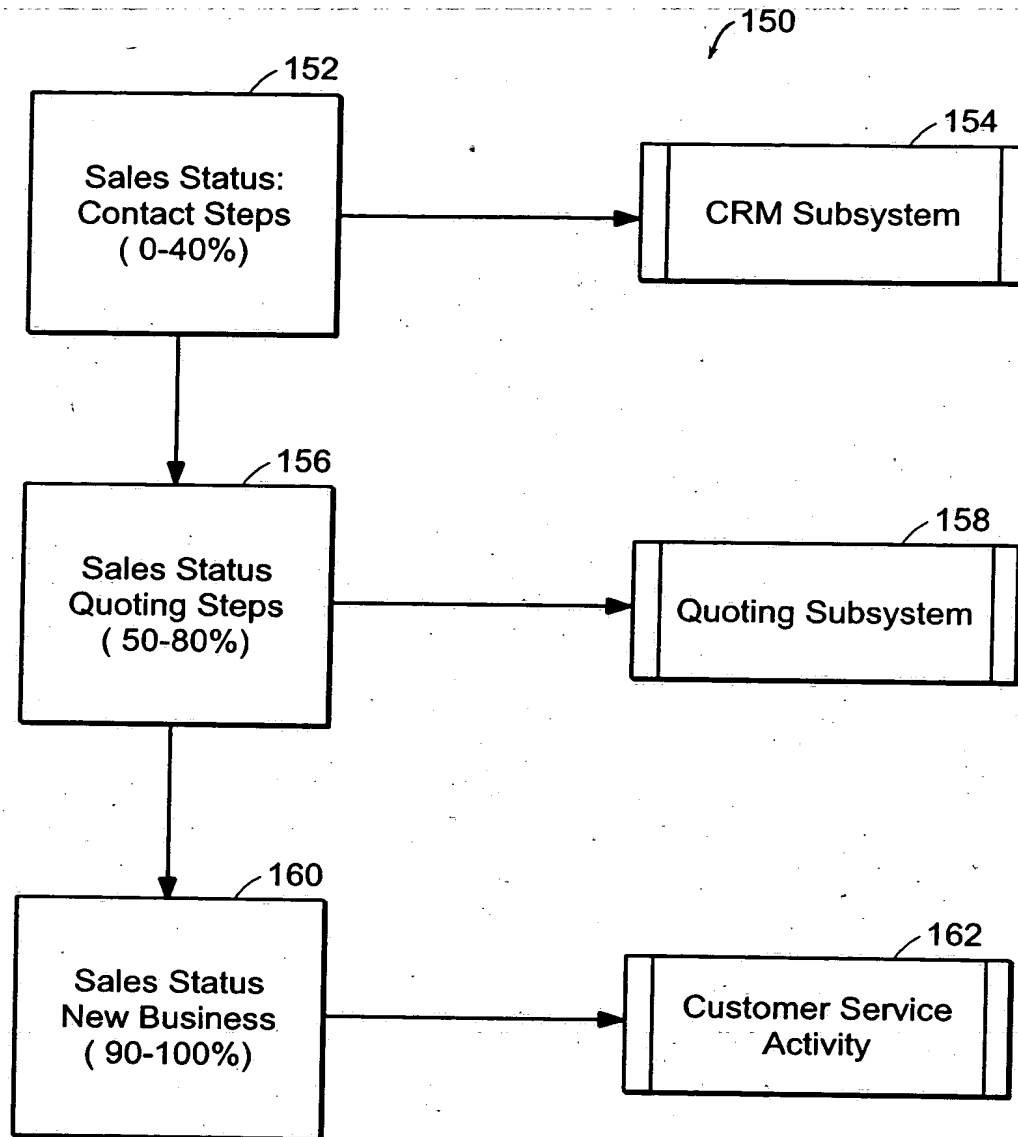


FIG. 3

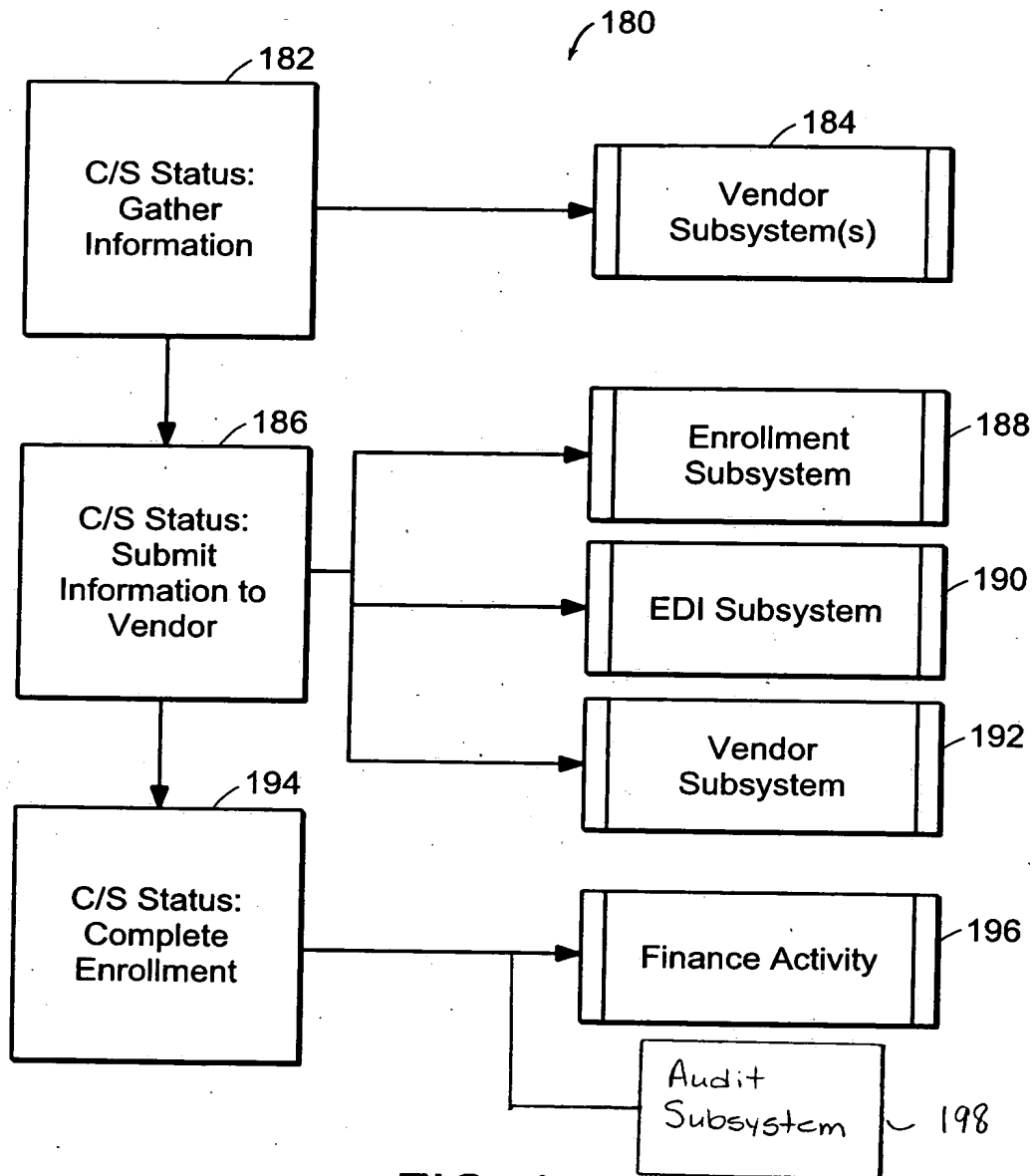


FIG. 4

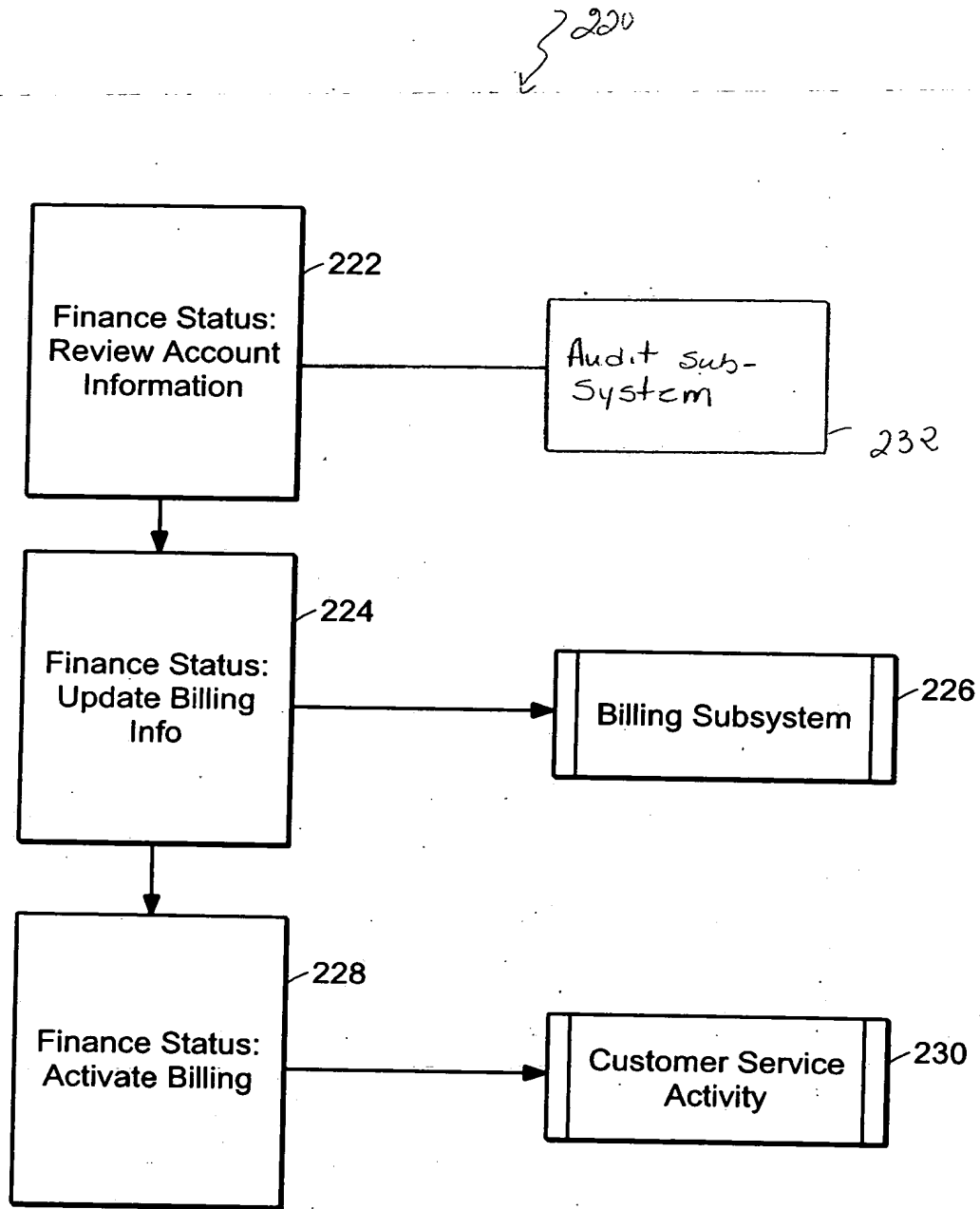
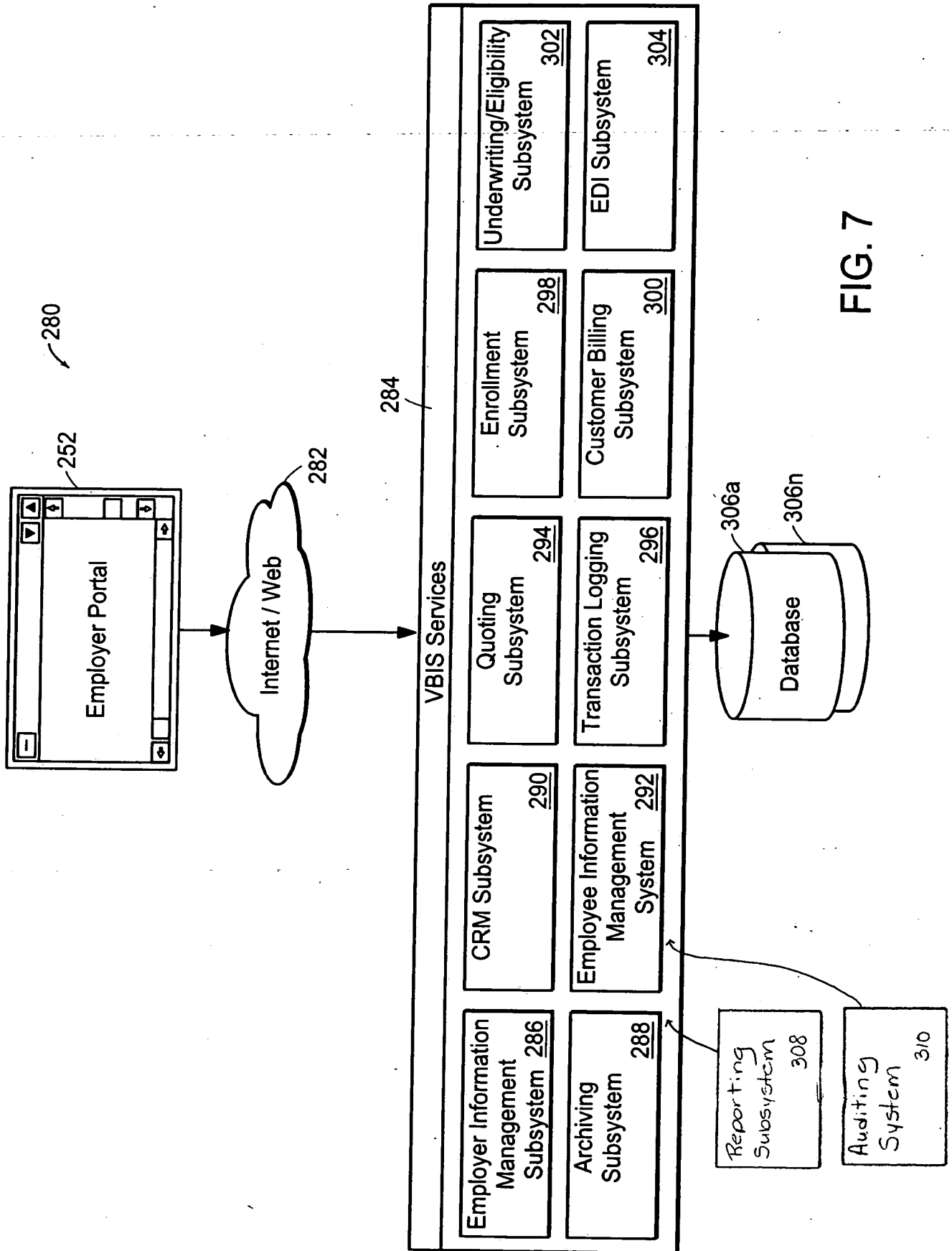


FIG. 5

250

Employer Portal	<u>252</u>
Employee Portal	<u>254</u>
Vendor Portal	<u>256</u>
CRM System	<u>258</u>
Carrier Management Portal	<u>260</u>
Partner Portal	<u>262</u>

FIG 6



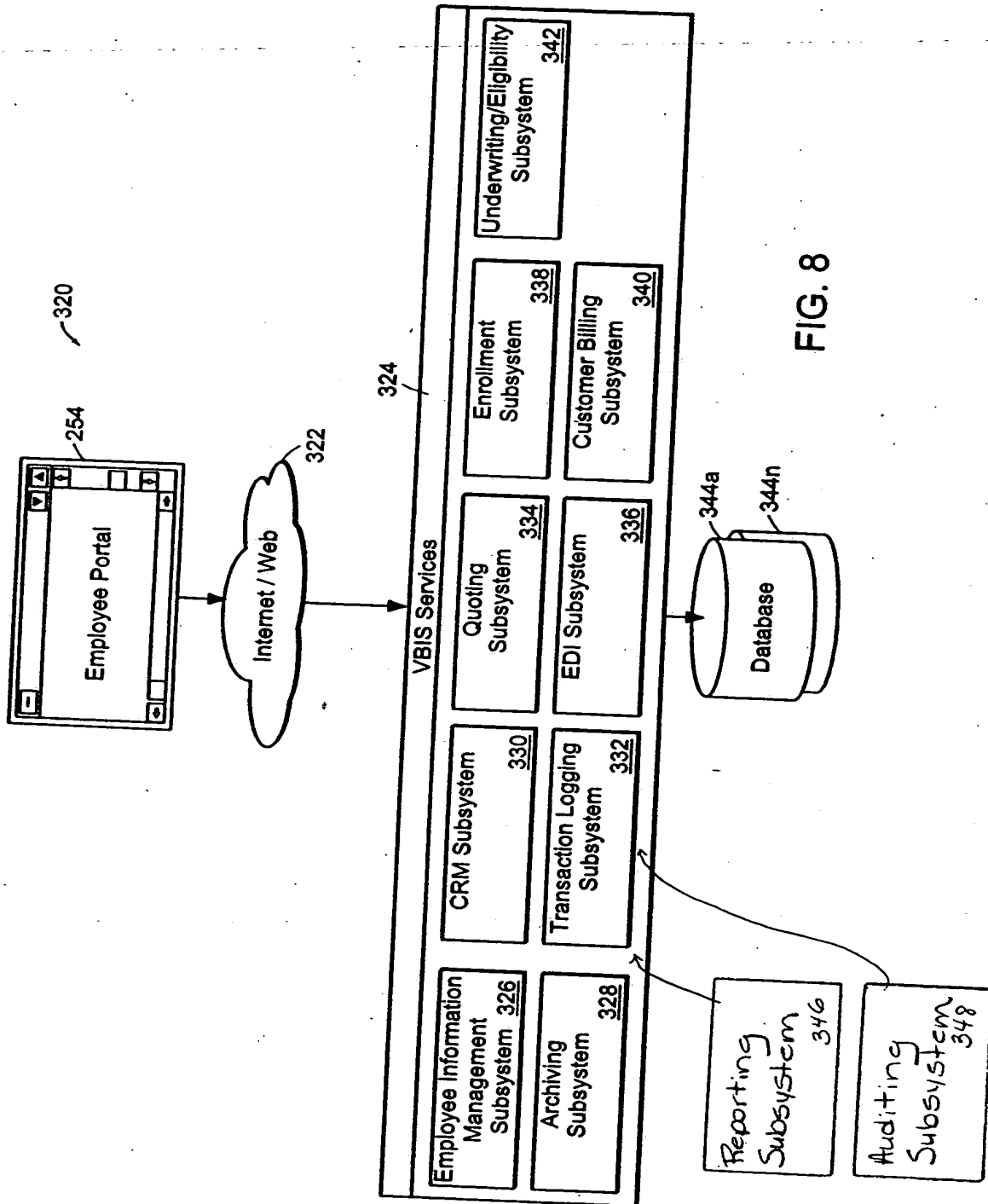


FIG. 8

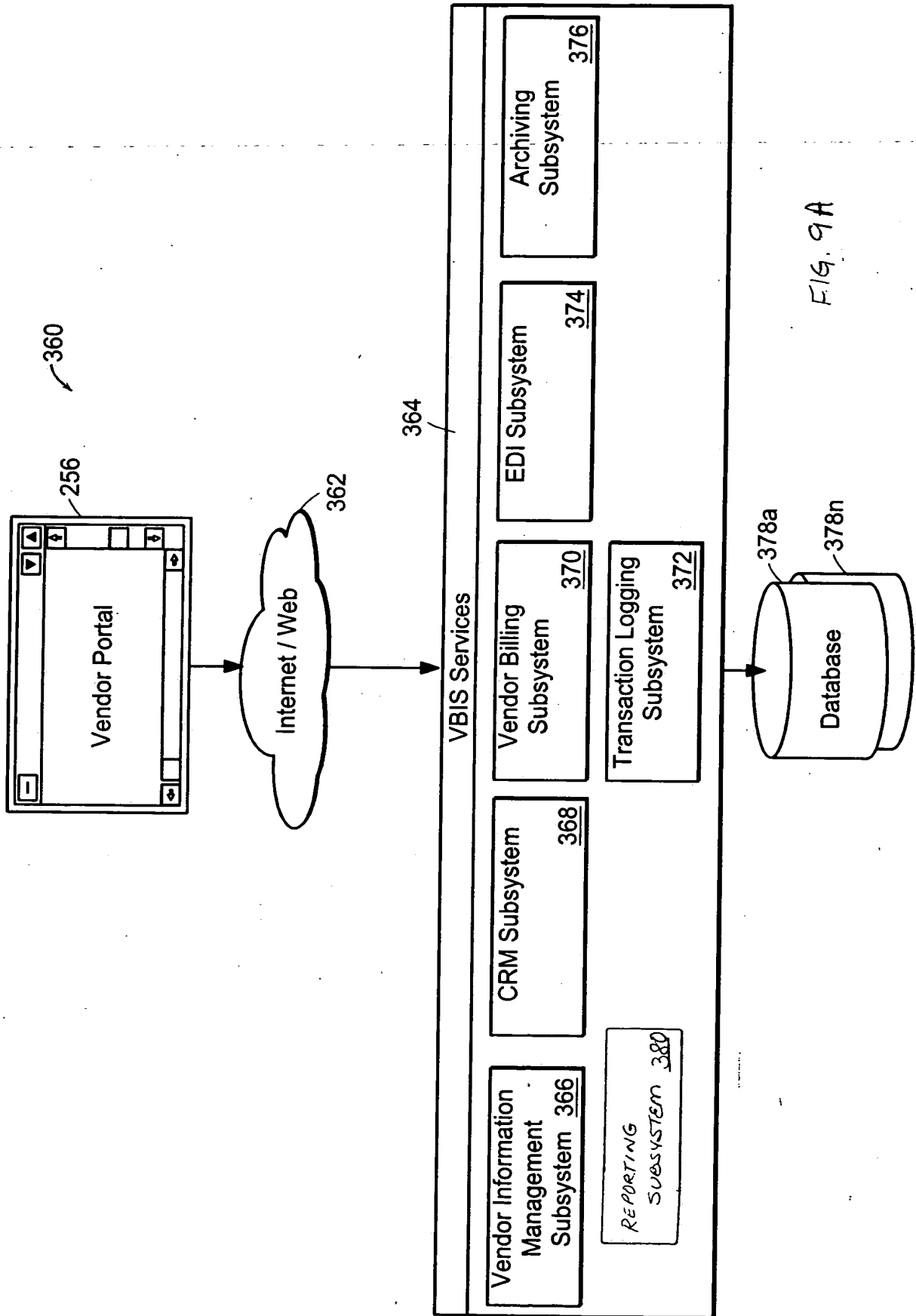


FIG. 9A

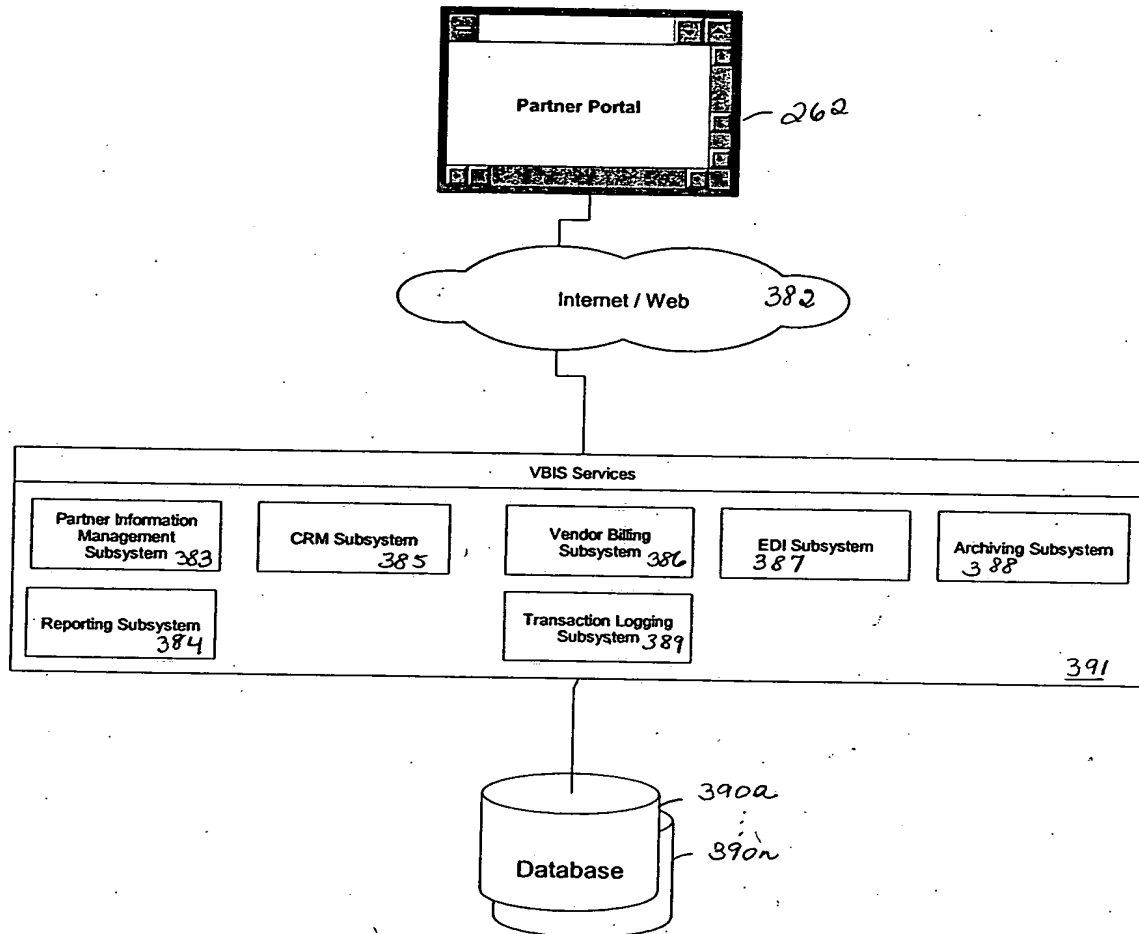


FIG. 9B

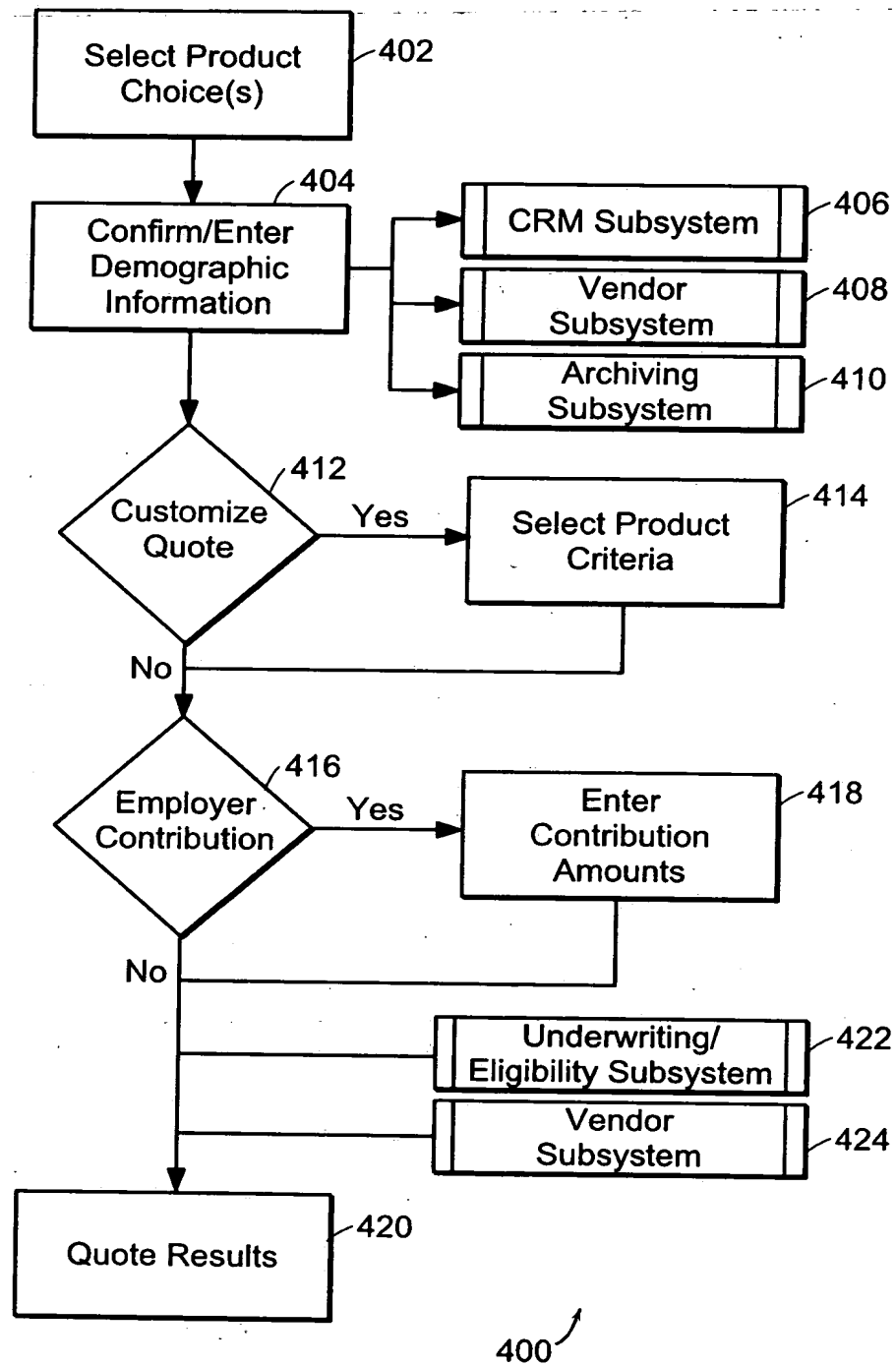


FIG. 10

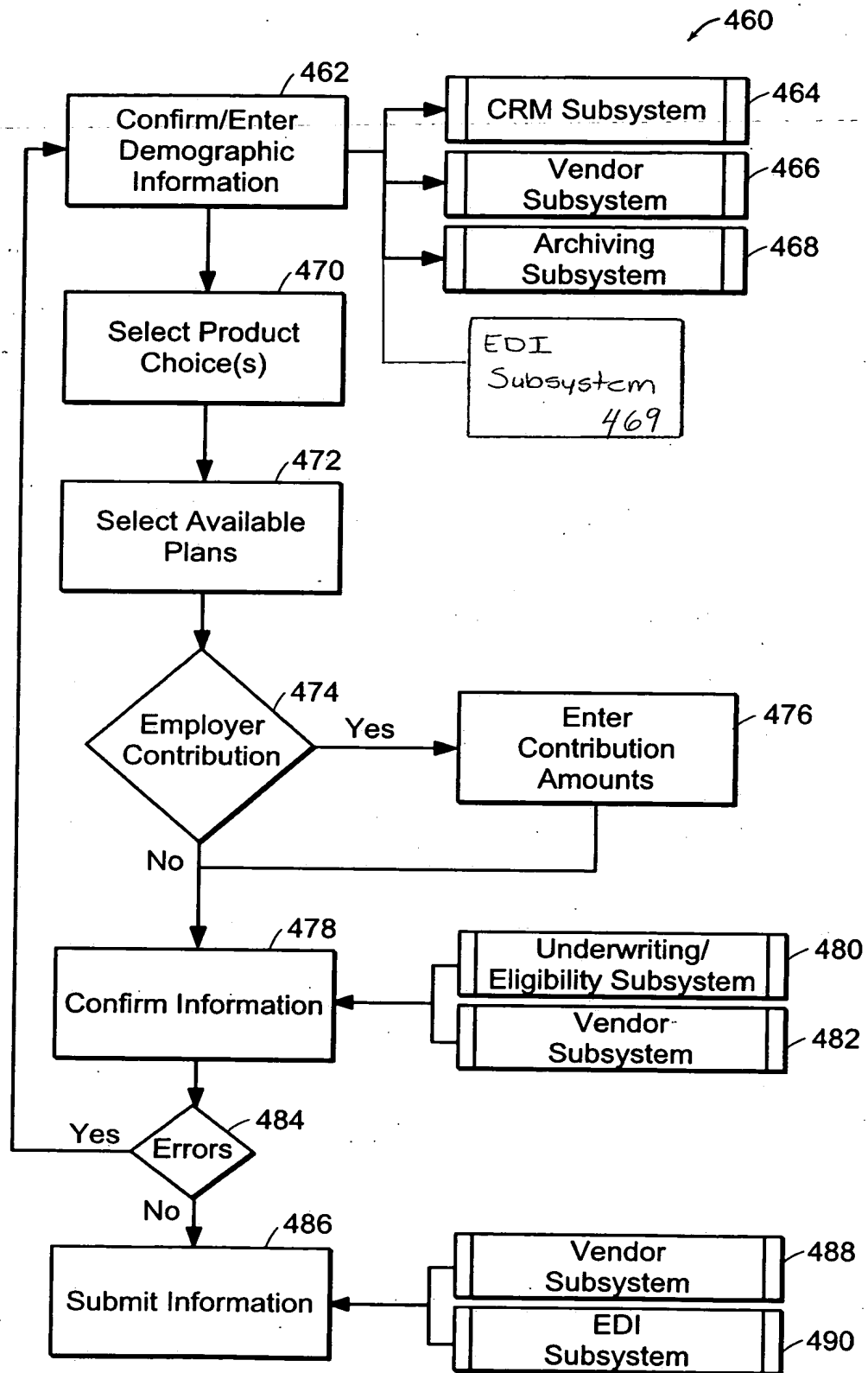


FIG. 11A

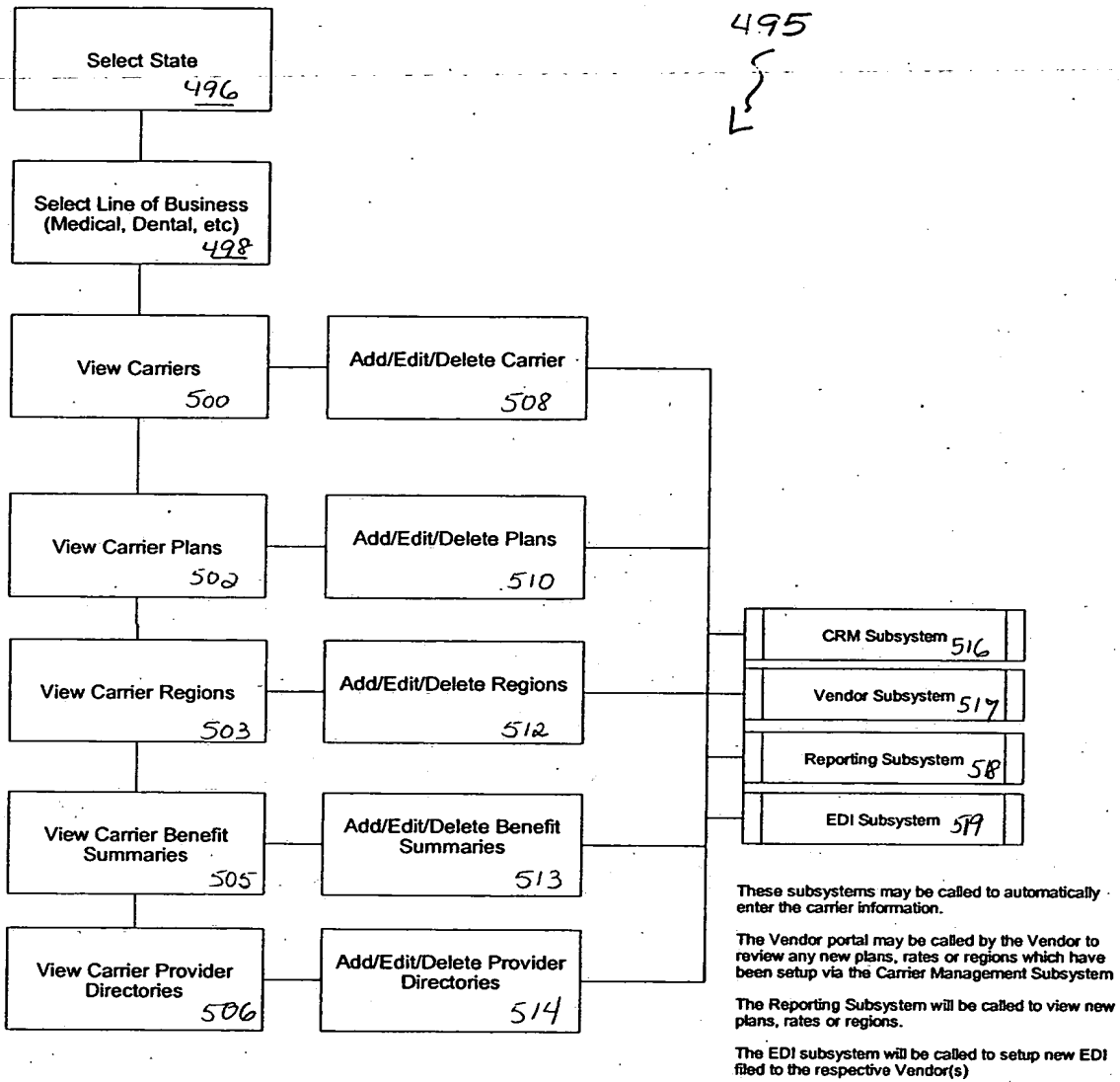


FIG. 11B

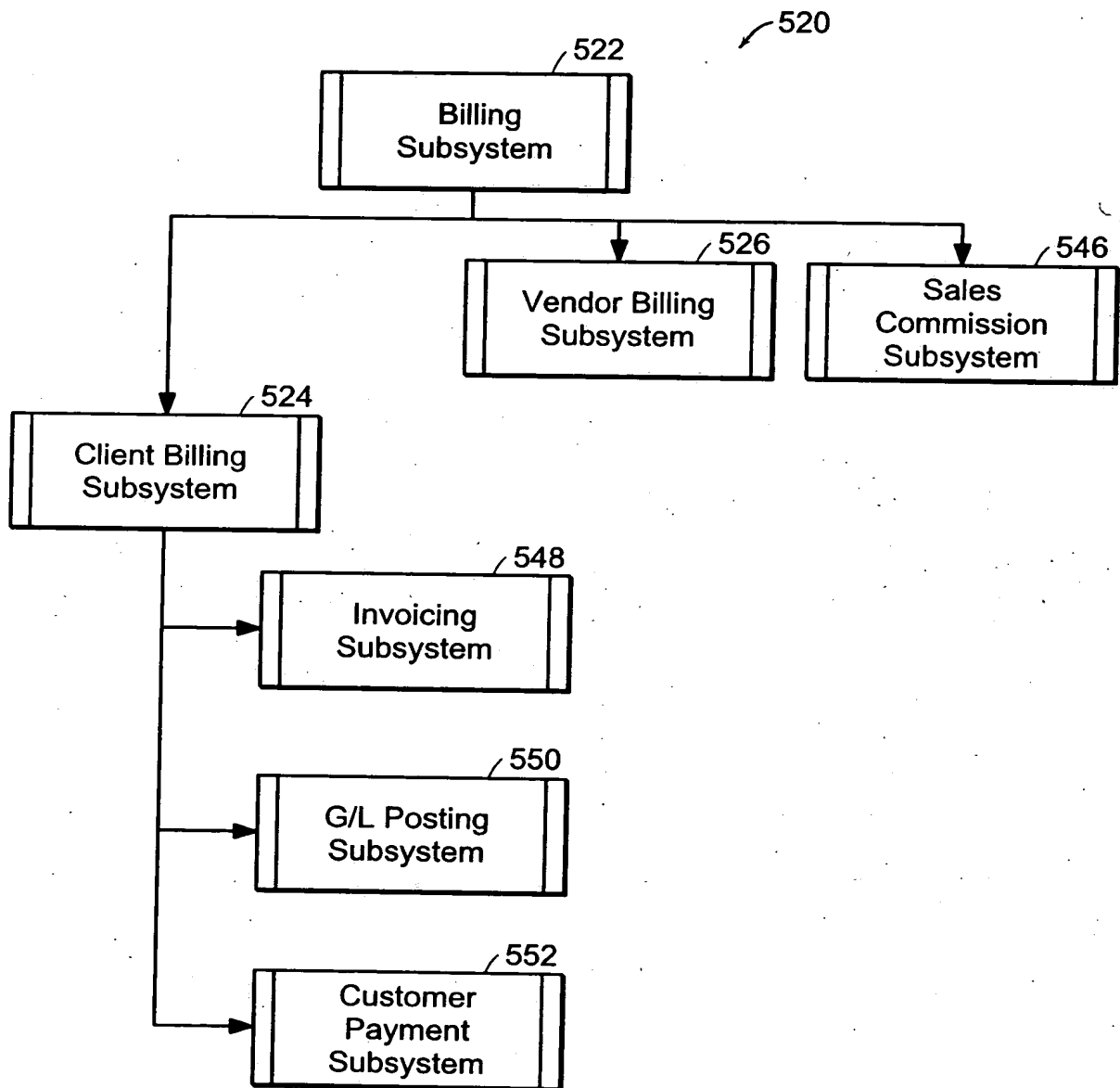


FIG. 12

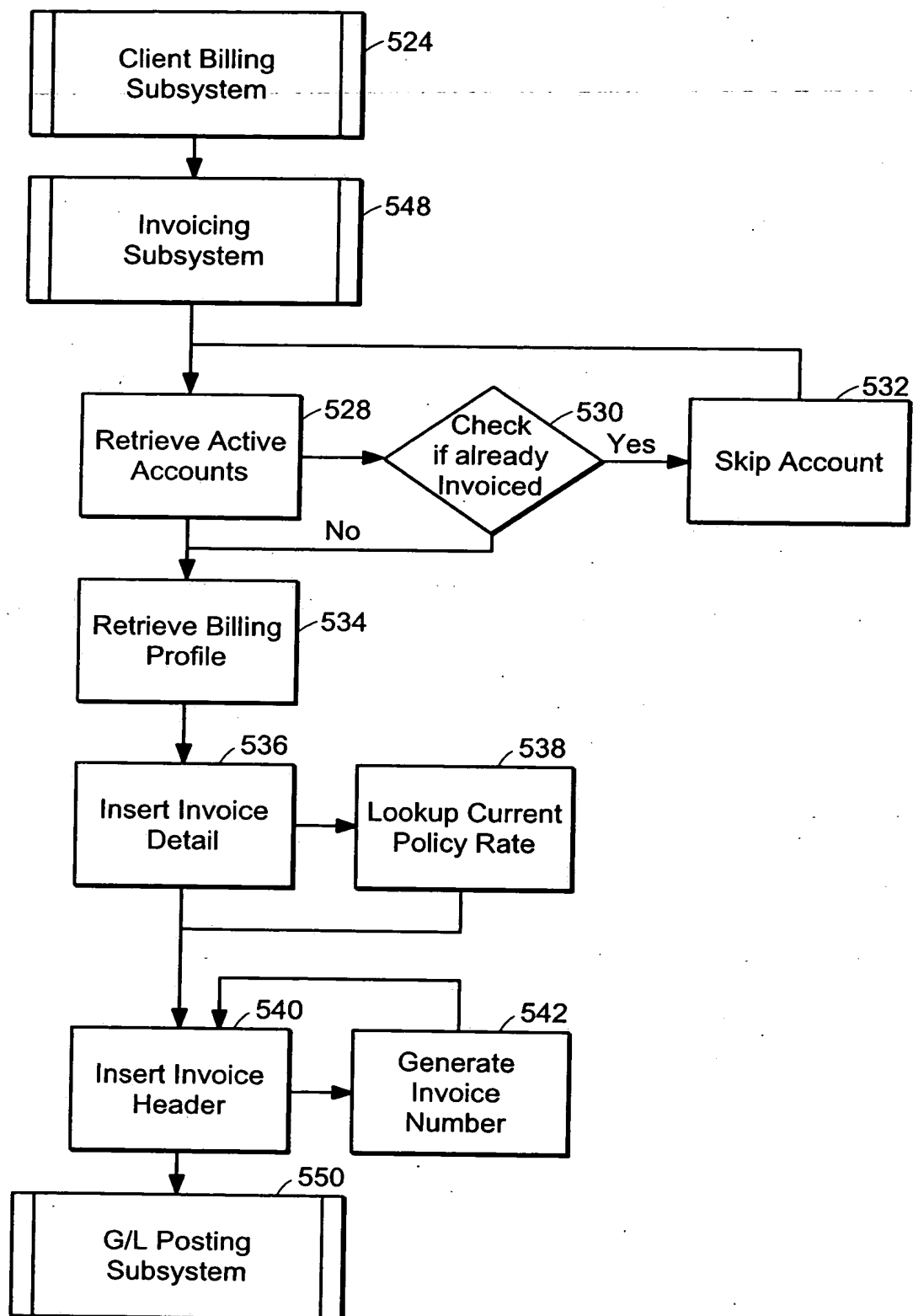


FIG. 13A

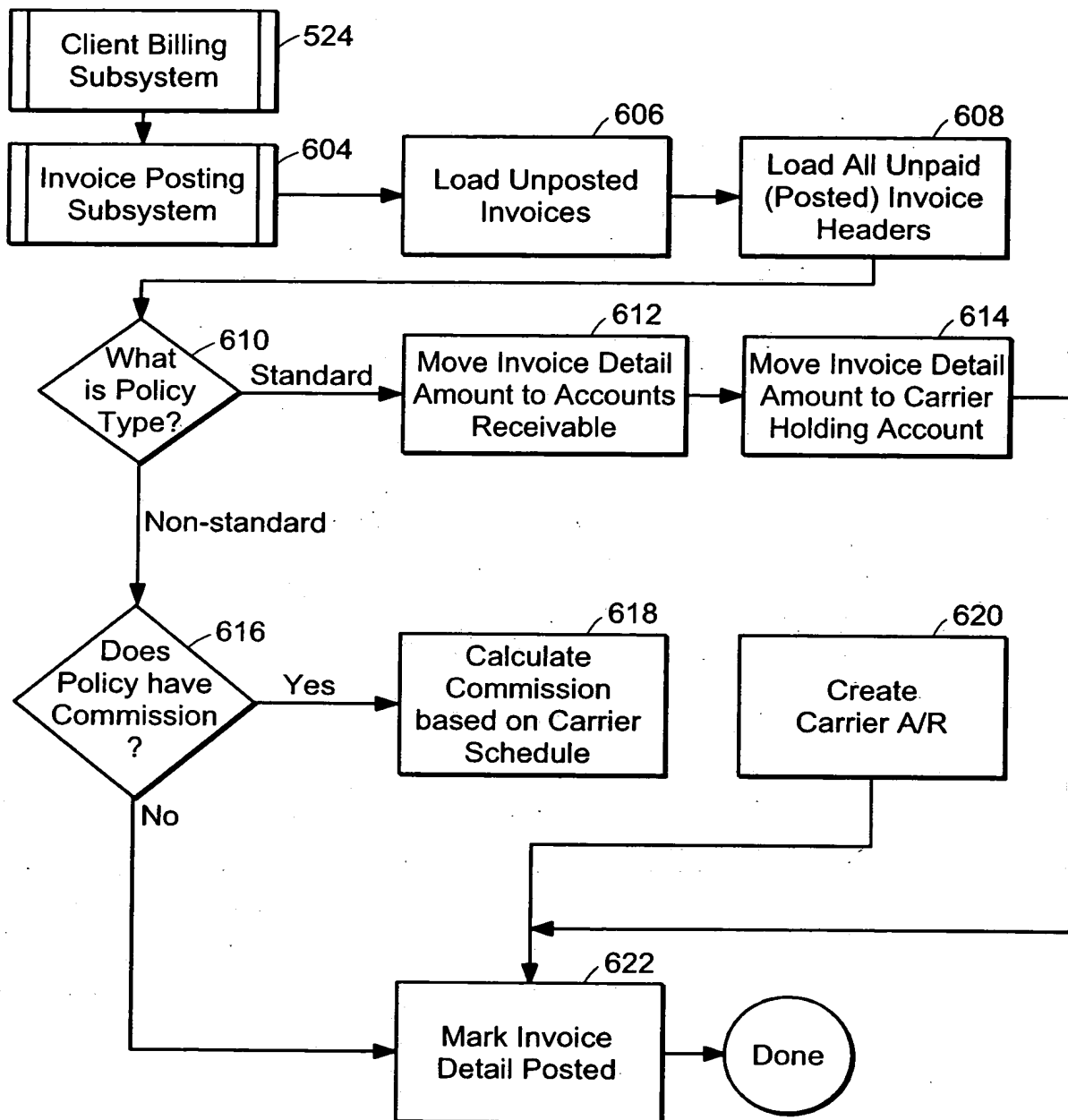


FIG. 13B

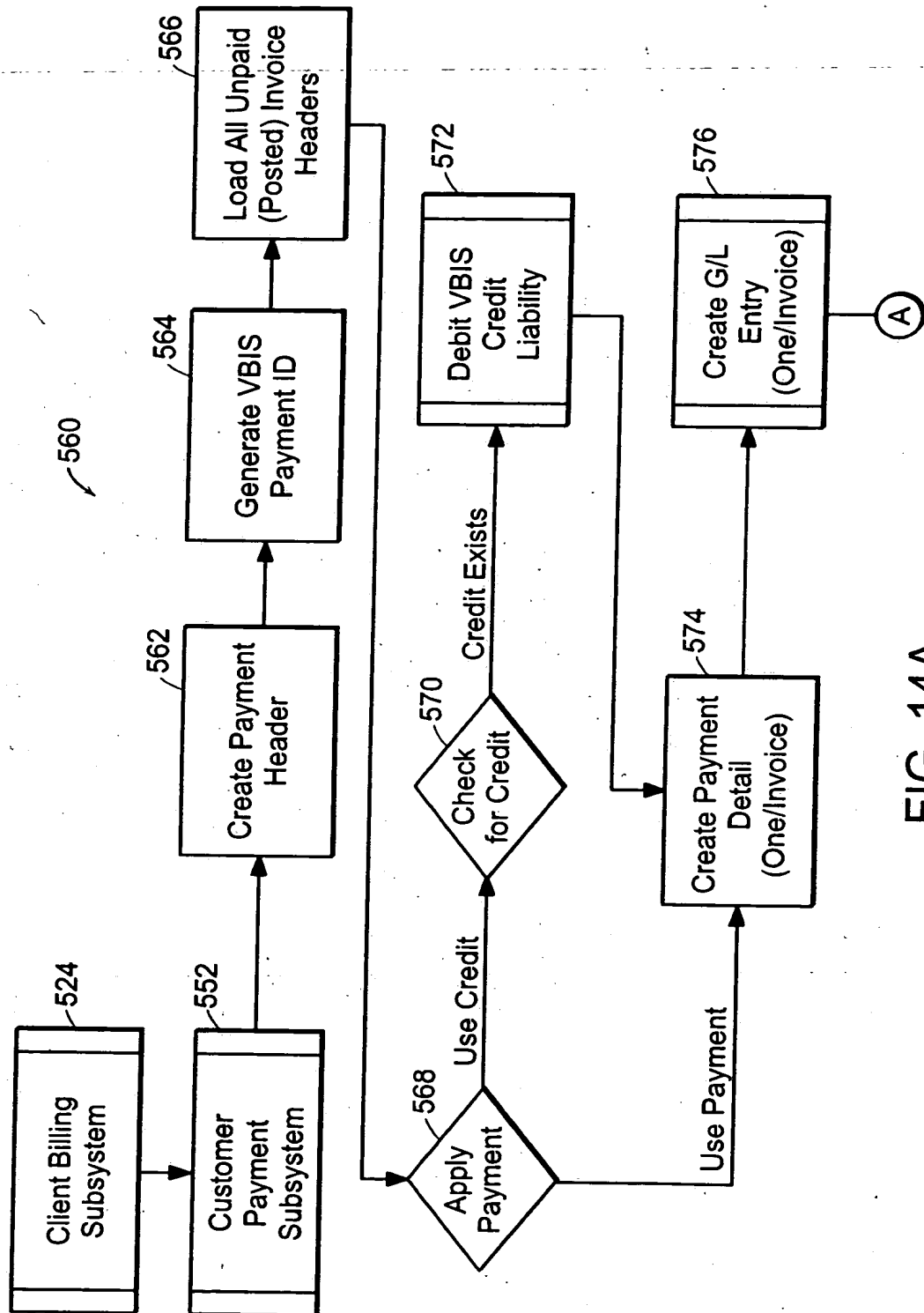


FIG. 14A

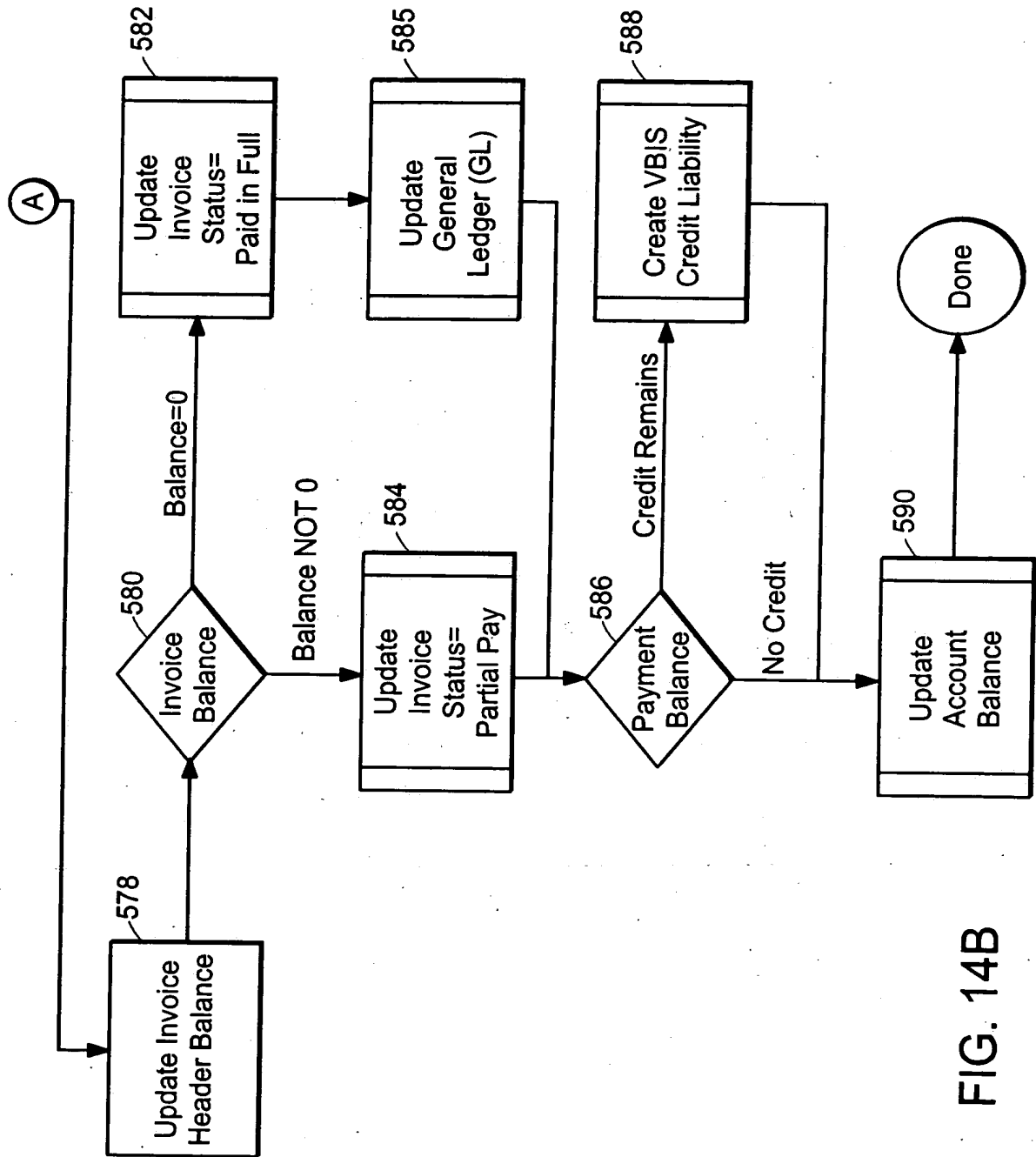


FIG. 14B

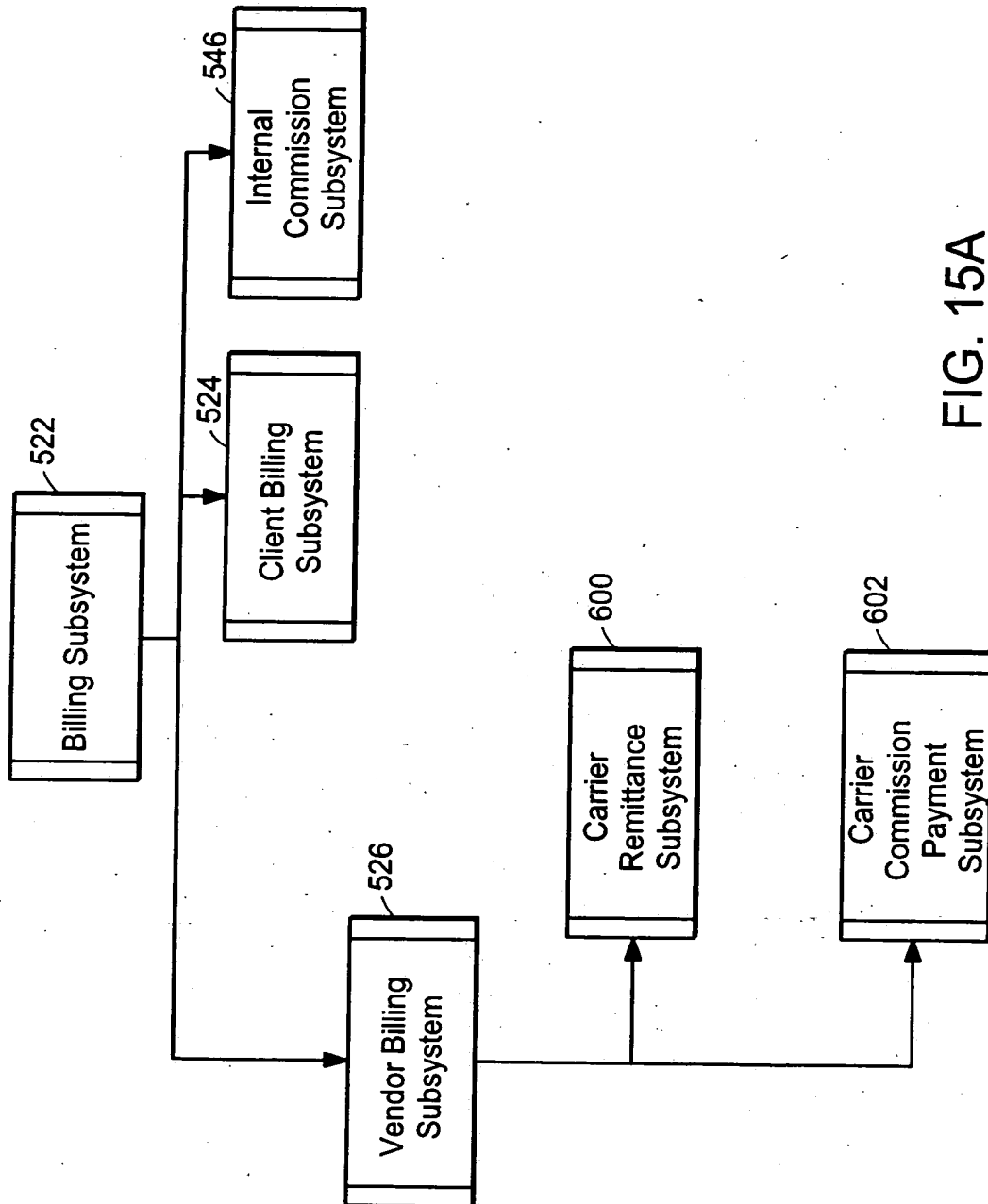


FIG. 15A

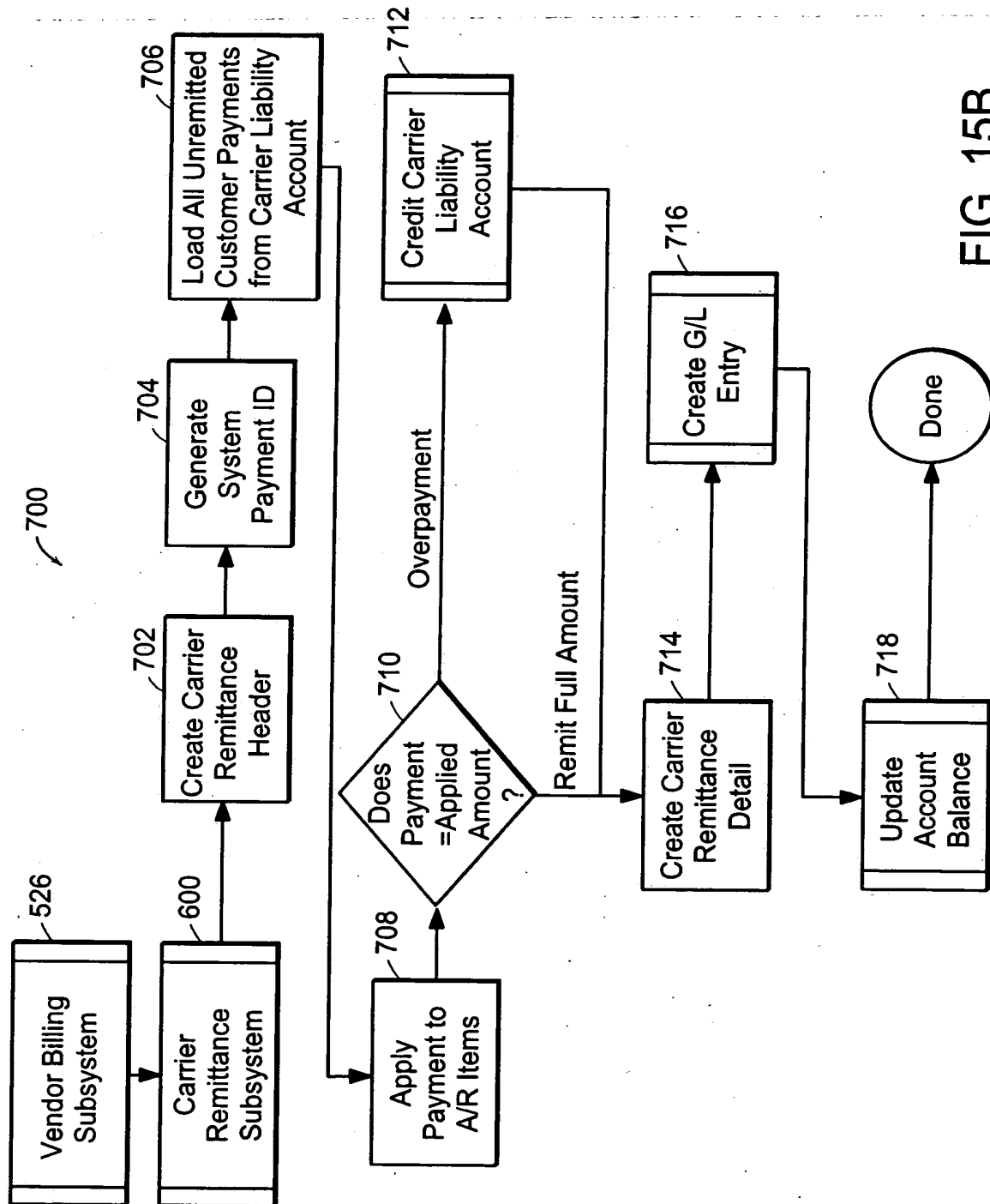


FIG. 15B

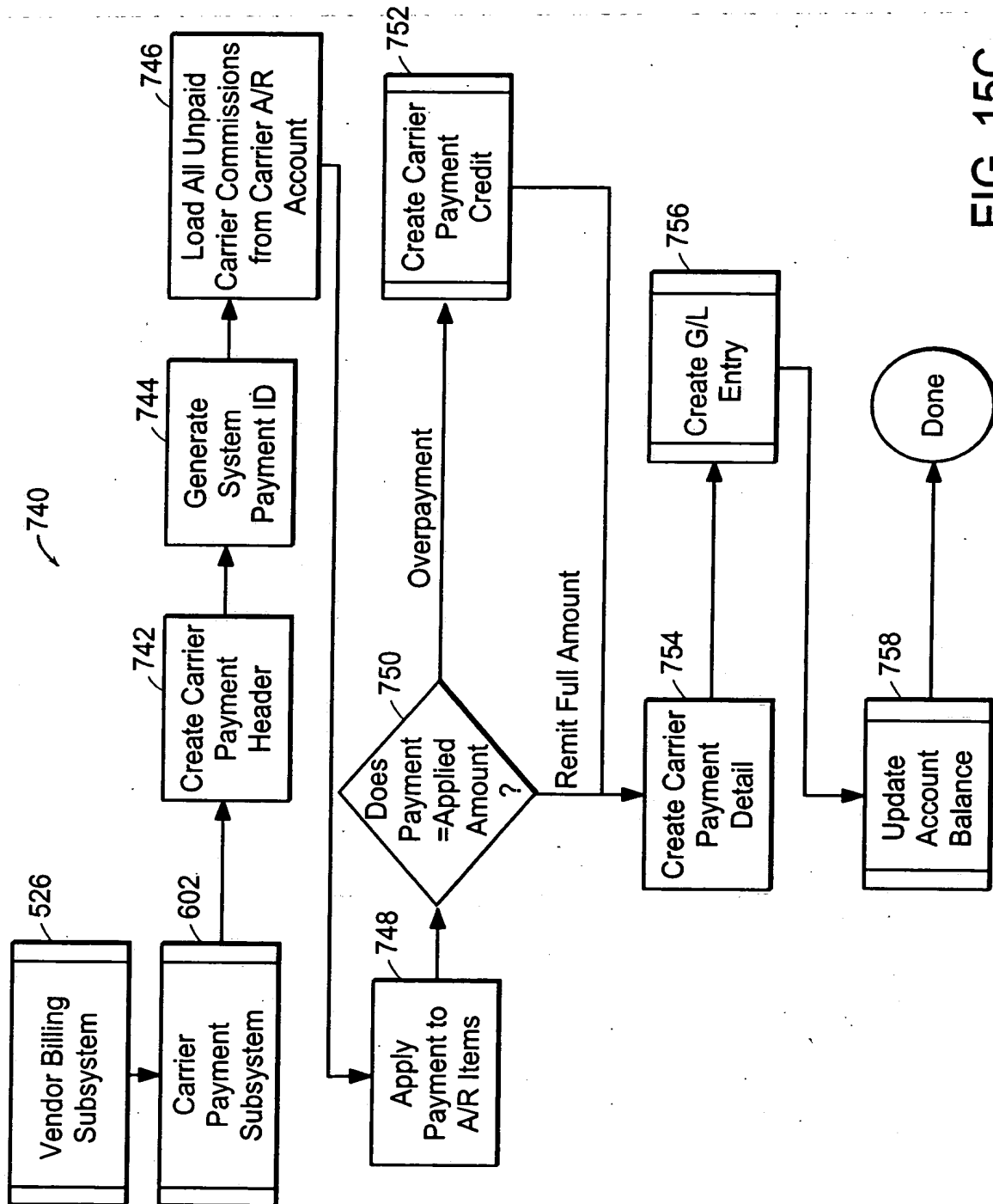


FIG. 15C

FIG. 16A-1
FIG. 16A-2

FIG. 16A

800

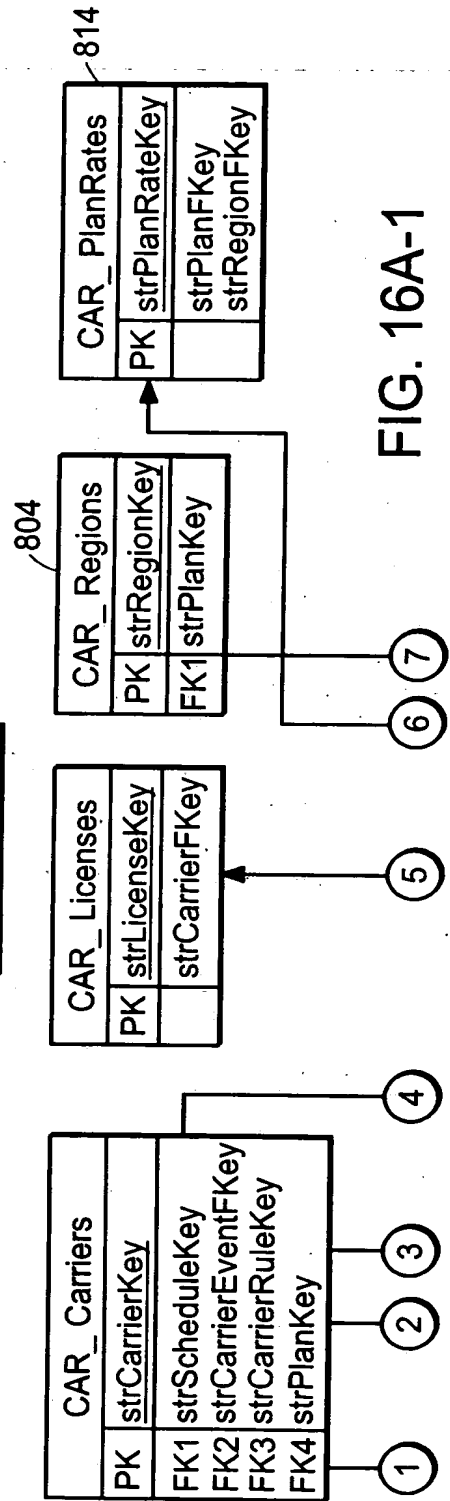
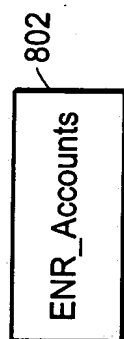
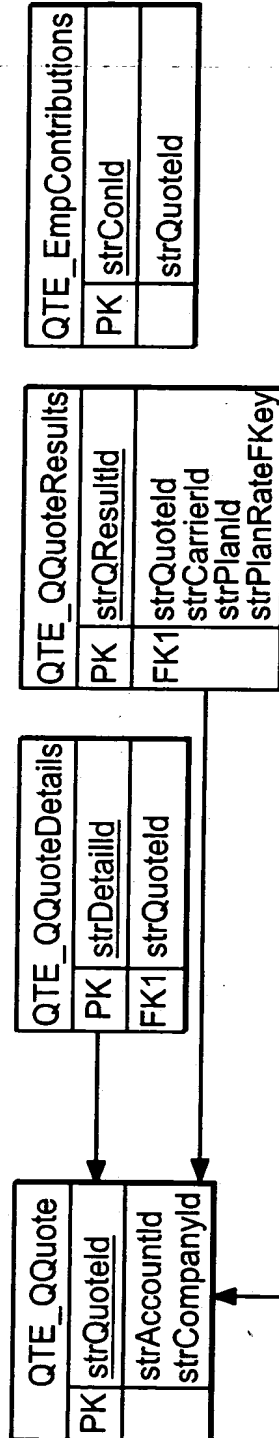


FIG. 16A-1

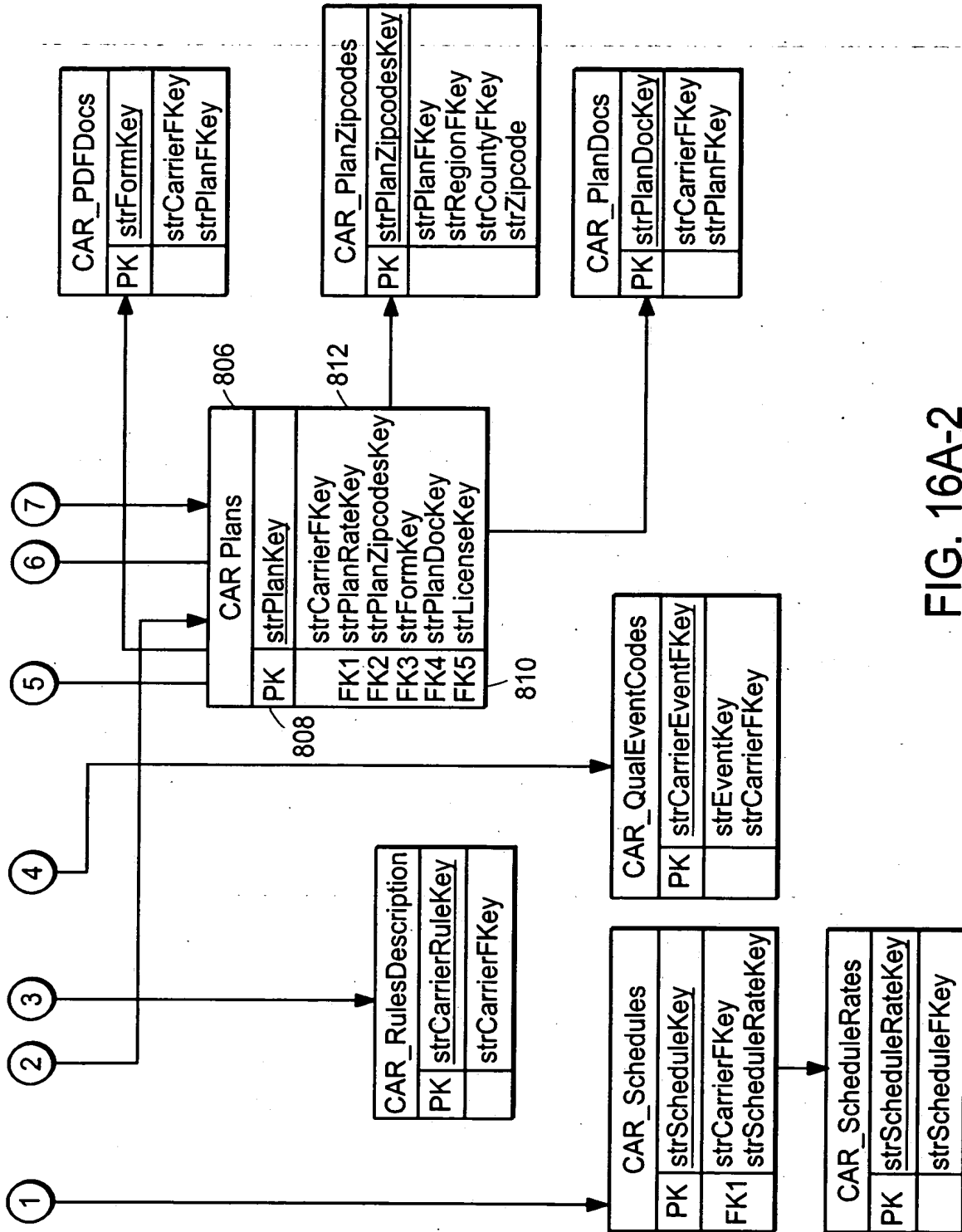


FIG. 16A-2

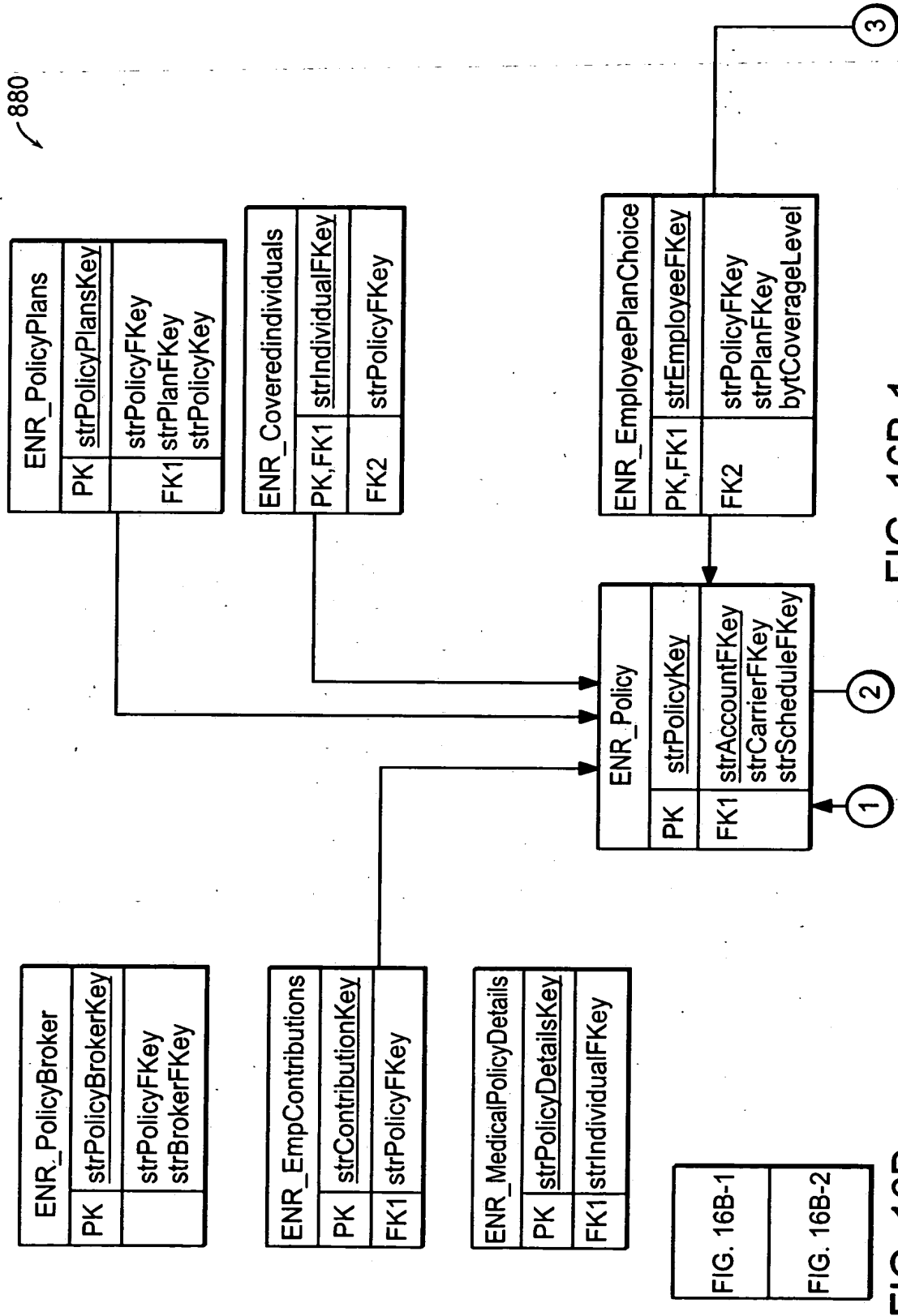


FIG. 16B-1

FIG. 16B

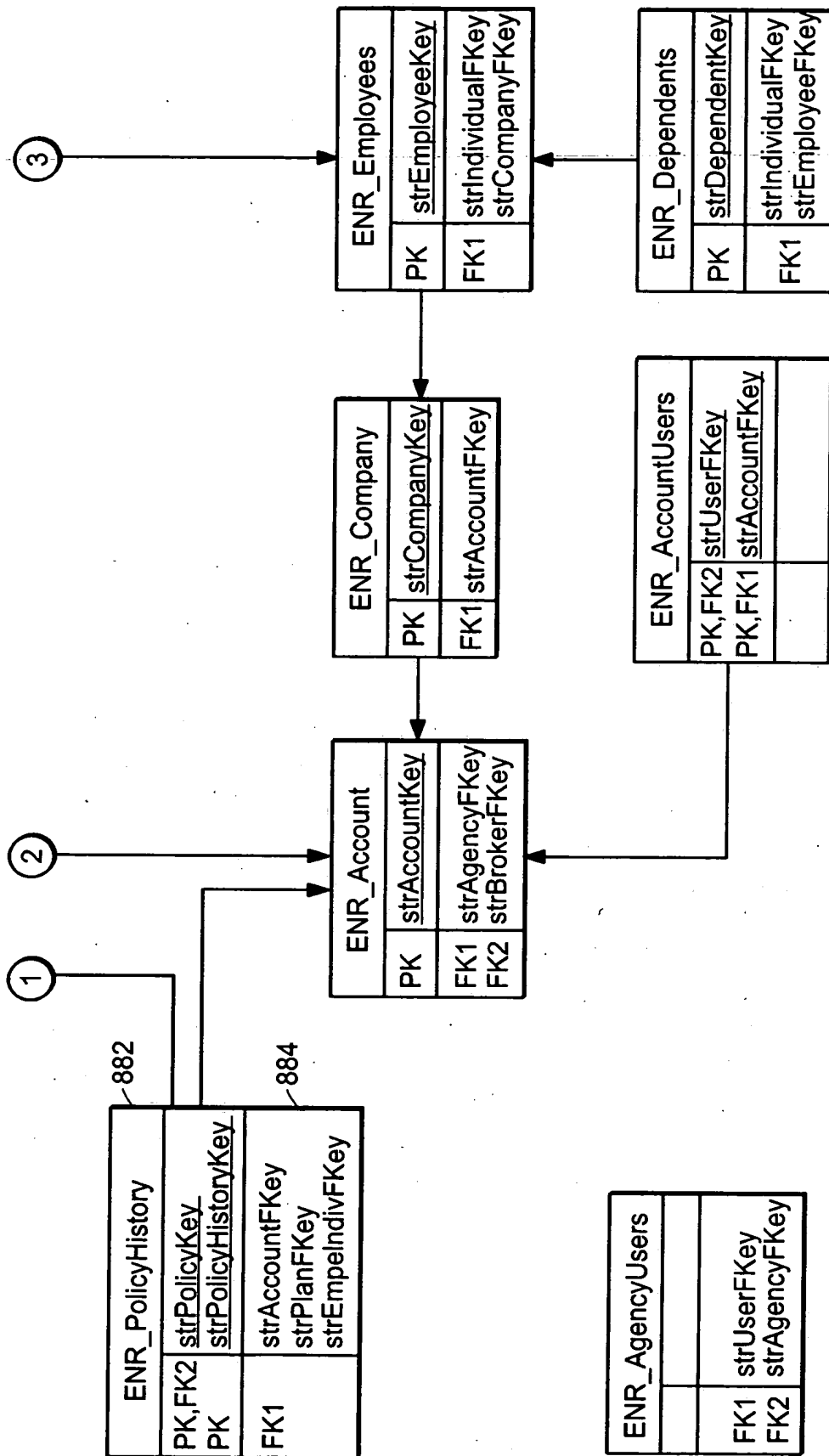


FIG. 16B-2

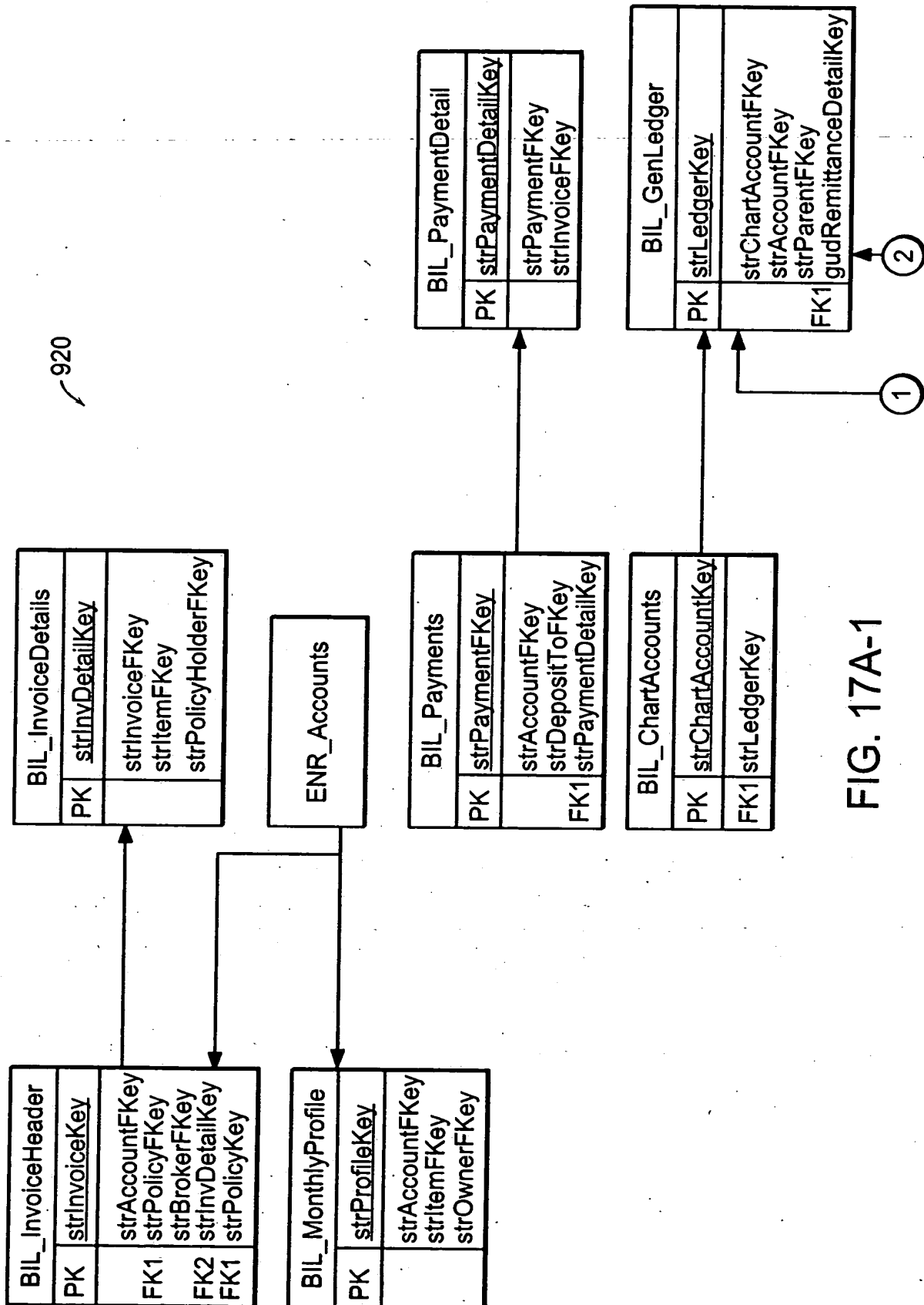


FIG. 17A-1

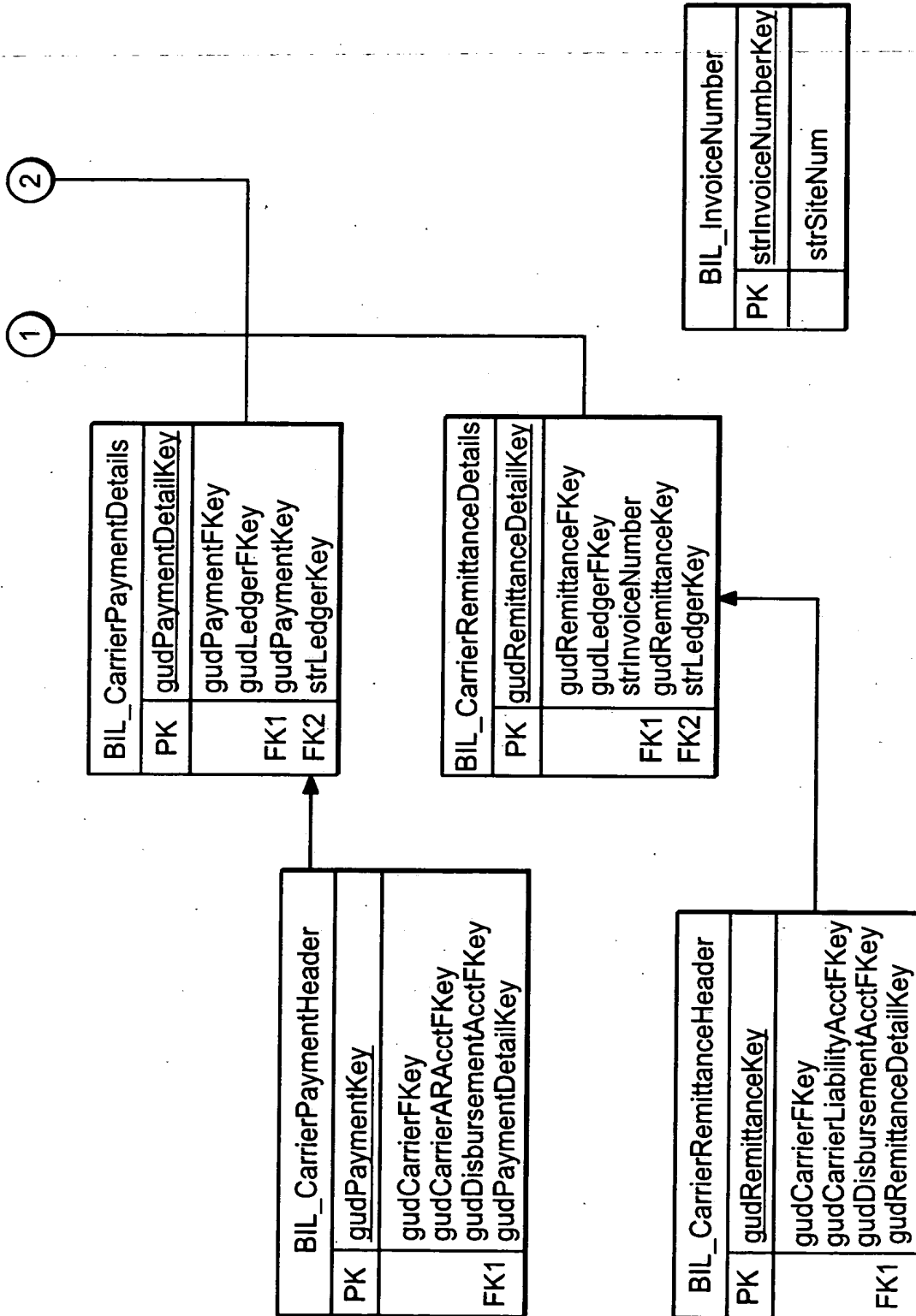
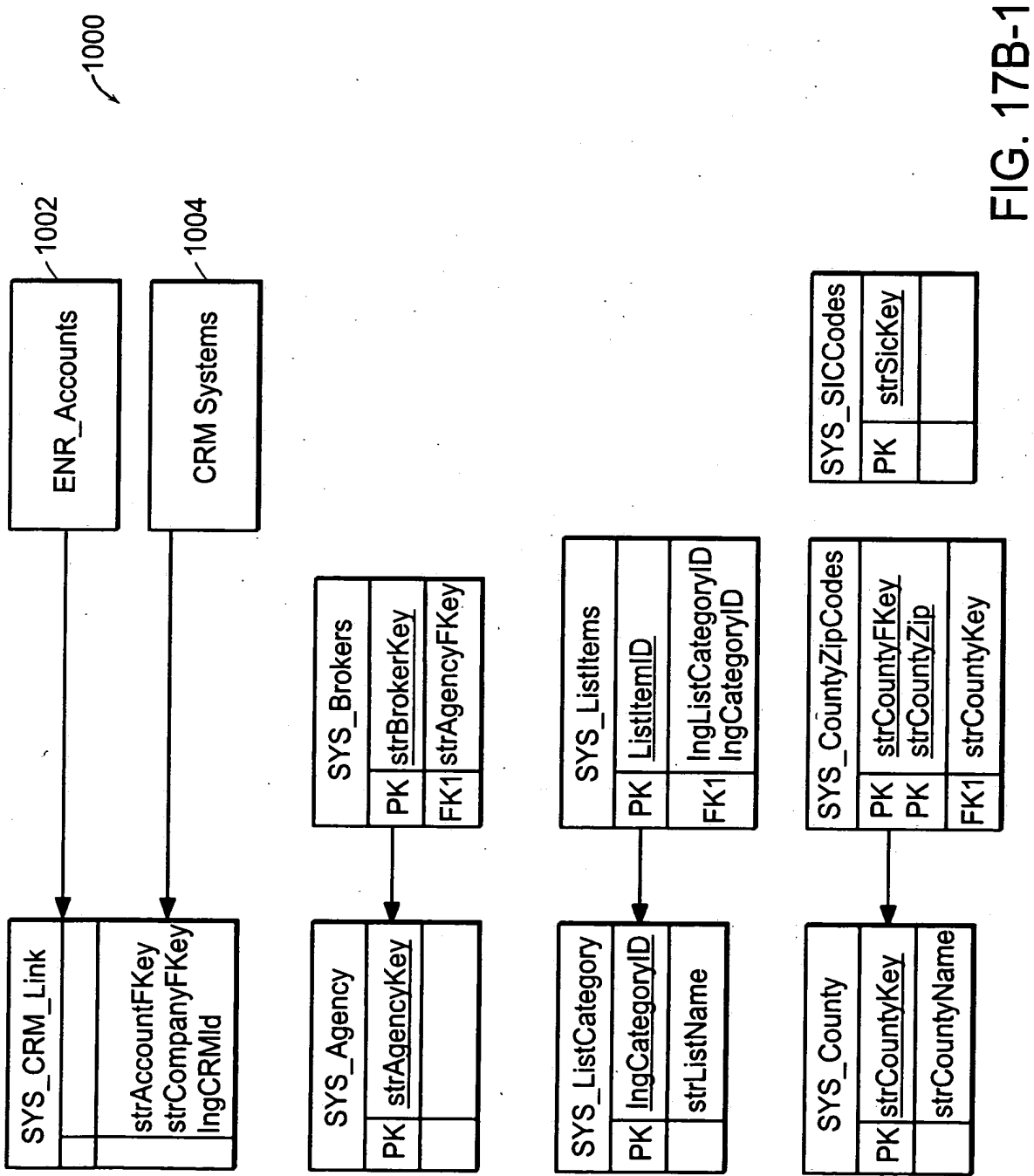
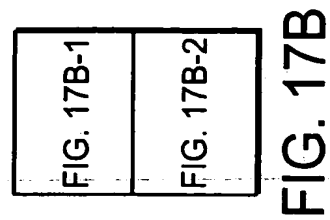


FIG. 17A-2



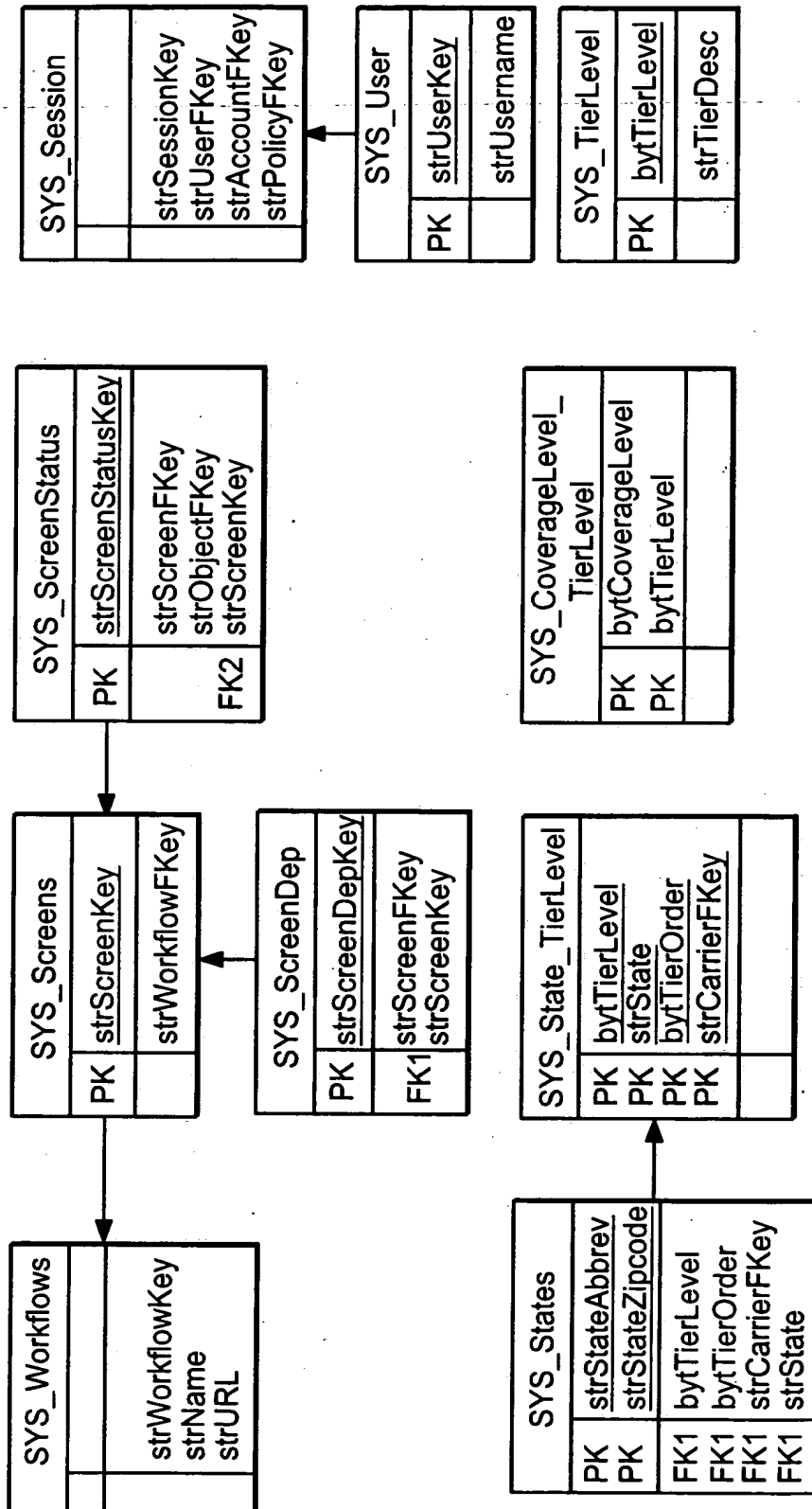
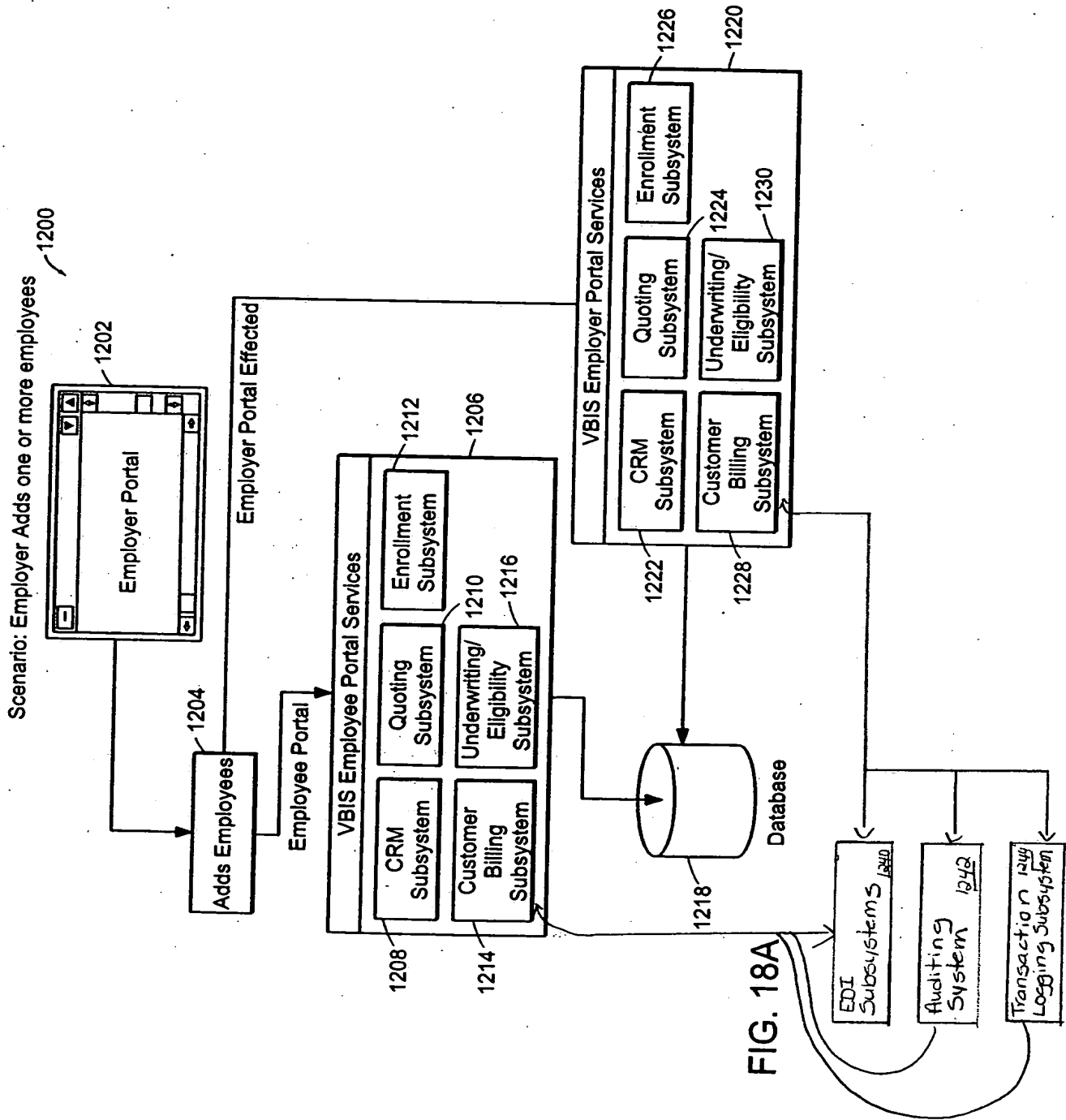


FIG. 17B-2



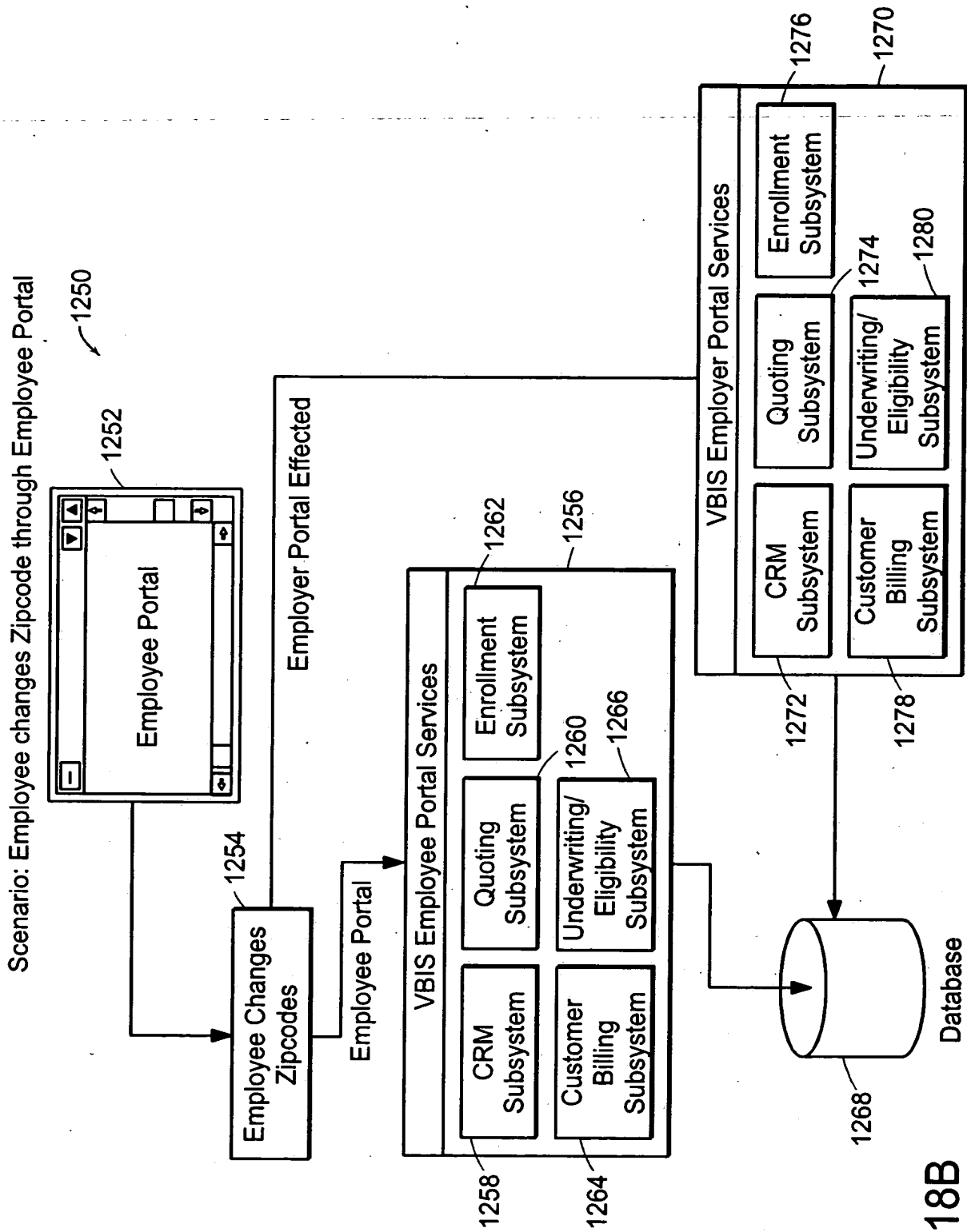


FIG. 18B


1300

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorite History Print

Address Go



ID 3033-Vernon Village Inc

Customer ID

Navigation Bar

☐ Individuals

☐ Companies

☐ Task Manager

☐ List Management

☐ Messenger

☐ Sales Tools

☐ Service Tools

☐ Internet Tools

☐ Collaboration

☐ Account Exec

☐ Account Info

☐ View Quotes

☐ Account Access

1302

1304




1306

Account Access

User	Username	Password	Expires	Setup	Login
James Giulietti	wi	wi7gold	02/28/2003	Setup	Login
Ann Giulietti		5 to 9	Not Set	Setup	Login

In order to create quotes for an account, you must first set up a username and password that will access the account. To do this, click the *Setup* link next to a user and follow the instructions on that screen.

If you have already set a user up, you may click the *Login* link next to the user, and you will be logged into the system as that user.



Ready

Internet

FIG. 19

1350


Value Benefits Portal- Web Client-Microsoft Internet Explorer	
File Edit View Favorites Tools Help	
Back Forward Search Favorite History	
Address <input type="text" value="https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp"/> Go	
<div><div><div>ID 3033-Vernon Village Inc</div></div><div><div>Company <input type="text" value="Vernon"/></div><div>Navigation Bar<ul style="list-style-type: none"><input type="checkbox"/> Individuals<input type="checkbox"/> Companies<input type="checkbox"/> Task Manager<input type="checkbox"/> List Management<input type="checkbox"/> Messenger<input type="checkbox"/> Sales Tools<input type="checkbox"/> Service Tools<input type="checkbox"/> Internet Tools<input type="checkbox"/> Collaboration<input type="checkbox"/> Account Exec<input type="checkbox"/> Account Info<input type="checkbox"/> View Quotes<input type="checkbox"/> Account Access<input type="checkbox"/> Customer Service<input type="checkbox"/> Account Info<input type="checkbox"/> Finish Account<input type="checkbox"/> View Invoices</div></div></div> <div><div>User James Giulietti</div><div>Username <input type="text" value="jwi"/></div><div>Password <input type="text" value="jwi7gold"/></div><div>Expires On <input type="text" value="02/28/2003"/></div><div>Access permissions<ul style="list-style-type: none"><input checked="" type="checkbox"/> Portal — 1352<input checked="" type="checkbox"/> Quoting — 1354<input checked="" type="checkbox"/> Public Enrollment — 1356<input checked="" type="checkbox"/> Private Enrollment — 1358</div><div><input checked="" type="checkbox"/> Log into portal after save</div><div><input type="button" value="Save"/></div></div> <div><div>Ready</div><div>Internet</div></div>	

FIG. 20

1370

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorite History Print

Address https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailredirect=true Go

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Account Info
- View Quotes
- Account Access
- Customer Service
- Billing Dept.

ID 29 - Joe's Garage II

[LOOKUP QUOTE](#) • [VIEW QUOTE](#) • [CREATE NEW QUOTE](#)

Account Info.

Account Key: {F949E7F8-C360-4206-BC09-C1298058D099}

Account Name: Joe's Garage

Account Type: Company

Status Flag: Active

Policy Number	Policy Type	Carrier	Exp.Date	Status
	Medical	Empire BCBS	10/1/2002	Active

© 2001 Value Benefits, Inc.

Ready

Internet

FIG. 21

1400

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search * Favorite History

Address https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go

ID 29 - Joe's Garage II

[LOOKUP QUOTE](#) [ACCOUNT INFO.](#) [CREATE NEW QUOTE](#)

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Account Info
- View Quotes
- Account Access
- Customer Service
- Billing Dept.

View Quotes

Quote Name	Company	Email	Password	Quote Date	Effective Date	Attach	Detach
MvQuote 03-04-02 14-56	Joe's Garage	-	-	3/4/2002	1/1/2002		<input type="checkbox"/>
MvQuote 03-08-02 14-52	Joe's Garage	-	-	3/8/2002	4/1/2002		<input type="checkbox"/>
MvQuote 03-04-02 14-55	Joe's Garage	-	-	3/4/2002	1/1/2002		<input type="checkbox"/>
MvQuote 03-04-02 14-55	Joe's Garage			3/4/2002	1/1/2002		<input type="checkbox"/>

Ready

Internet

FIG. 22

1450

https://dgriffin/vbisenbleprototype/ Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorite History Print

Address https://dgriffin/vbisenbleprototype/ Go

AE

Account Access

CSR

Enrollment setup

Account Access

Account Maintenance for Joe's Garage

In order to create quotes for an account, you must first set up a username and password that will access the account. To do this, click the *Setup* link next to a user and follow the instructions on that screen.

If you have already set a user up, you may click the *Login* link next to the user, and you will be logged into the system as that user

Account Access			
User	Username	Password	Expires
Joe Smith	jsmith	joe	02/28/2002
Mary Smith	msmith	mary	02/28/2002

Local Intranet

FIG. 23

1470

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorite History Print

Address https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go

ID 29 - Joe's Garage II

INVOICE • PAYMENT • CREATE NEW ENROLLMENT

Account Info.

Account Key: {F949E7F8-C360-4206-BC09-C1298058D099}

Account Name: Joe's Garage

Account Type: Company

Status Flag: Active

Enrollment Profile

Employee	Plan	Coverage	Rate	Effective From	Last Invoice
Medical: EMPNY004					
Barry Goldsmith	EMPNY004	Ind+Spouse	\$442.08	10/1/2001	4/1/2002
Cindy Smith	EMPNY002	Family	\$811.98	10/1/2001	4/1/2002
George Tapely	EMPNY004	Ind+Child(ren)	\$397.87	10/1/2001	4/1/2002
Joe Smith	EMPNY002	Family	\$811.98	10/1/2001	4/1/2002
Keith Brown	EMPNY002	Ind+Spouse	\$540.62	10/1/2001	4/1/2002
Larry Bird	EMPNY002	Individual(Ind)	\$270.66	10/1/2001	4/1/2002
			\$3,275.19		
			\$3,275.19		

Customer ID 29

Navigation Bar

☐ Individuals

☐ Companies

☐ Task Manager

☐ List Management

☐ Messenger

☐ Sales Tools

☐ Service Tools

☐ Internet Tools

☐ Collaboration

☐ Account Exec

☐ Customer service

☐ Account Info

☐ Finish Account

☐ View Invoices

☐ View Payment

☐ View Policies

☐ Discount Cards

☐ Account Access

☐ BOR Setup

☐ Billing Dept.

Ready Internet

FIG. 24

1500

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back

Forward

Home

Search

History

Print

Stop

Reload

Address | https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go

Customer ID

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
 - Account Info
 - Finish Account
 - View Invoices
 - View Payments
 - View Policies
 - Discount Cards
 - Account Access
 - BOR Setup

ID 29 - Joe's Garage II

ACCOUNT INFO.

PAYMENT

CREATE NEW ENROLLMENT

Invoice List

Invoice Number	Company	Invoice Date	Amount	Status
VBI0102-104	Joe's Garage	1/1/2002	\$6,174.34	0
VBI0202-105	Joe's Garage	2/1/2002	\$6,174.34	0
VBI1201-470	Joe's Garage	12/1/2001	\$18,523.02	0
VBI0302-132	Joe's Garage	3/1/2002	\$19,651.14	0
VBI0402-121	Joe's Garage	4/1/2002	\$3,275.19	0

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Ready

Internet

1550

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorite History Print

Address | https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go

ValueBenefits

Customer ID

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
 - Account Info
 - Finish Account
 - View Invoices
 - View Payments
 - View Policies
 - Discount Cards
 - Account Access
 - BOR Setup
 - Billing Dept.

ID 29 - Joe's Garage II
Review Invoice Details

ClientJoe's GarageInvoice NumVBI0102-104

Billing Address50 Freedom StreetInvoice Date1/1/2002

New York, NY 10020

ContactJoseph Smith

SalespersonConnl McMahonCustomer ID29

Plan ID	Enrollee	Gender	Coverage	Description	Rate
EMPNY	Barry Goldsmith	M	Ind+Spouse	Med. Coverage for 1/1/2002	\$442.08
EMPNY	George Tapely	M	Ind Child(ren)	Med. Coverage for 1/1/2002	\$397.87
EMPNY	Larry Bird	M	Individual	Med. Coverage for 1/1/2002	\$228.80
EMPNY	Joe Smith	M	Family	Med. Coverage for 1/1/2002	\$686.40
EMPNY	Cindy Smith	F	Family	Med. Coverage for 1/1/2002	\$686.40
EMPNY	Keith Brown	M	Ind+Spouse	Med. Coverage for 1/1/2002	\$457.60
EMPNY	Larry Bird	M	Individual	Med. Coverage for 1/1/2002	\$270.66
EMPNY	Keith Brown	M	Ind+Spouse	Med. Coverage for 1/1/2002	\$540.62
EMPNY	Joe Smith	M	Family	Med. Coverage for 1/1/2002	\$811.98
EMPNY	Cindy Smith	F	Family	Med. Coverage for 1/1/2002	\$811.98
EMPNY	Barry Goldsmith	M	Ind+Spouse	Med. Coverage for 1/1/2002	\$442.08
EMPNY	George Tapely	M	Ind Child(ren)	Med. Coverage for 1/1/2002	\$397.87
Current Premium					\$6,174.34
Previous Balance					\$0.00
Prior Payments					\$0.00
Balance Forward					\$0.00

ReadyInternet

FIG. 26

1570

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Home Search Favorite History Print

Address https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go

ID 14797 - Alex Mahony Heating & AC

[ACCOUNT INFO](#) [INVOICE](#) [CREATE NEW ENROLLMENT](#)

Payment List

Payment Number	Ref. Num:	Comment	Payment Date	Amount	Status
VBIP0102-107	2468	Binder Check	1/29/2002	\$4,477.29	0
VBIP0402-103	2684	-	4/8/2002	\$4,477.29	0
VBIP0302-102	2537	-	3/4/2002	\$4,477.29	0

Customer ID

Navigation Bar

☐ Individuals

☐ Companies

☐ Task Manager

☐ List Management

☐ Messenger

☐ Sales Tools

☐ Service Tools

☐ Internet Tools

☐ Collaboration

☐ Account Exec

☐ Customer Service

☐ Account Info

Ready

Internet

FIG. 27

Customer Service Activities

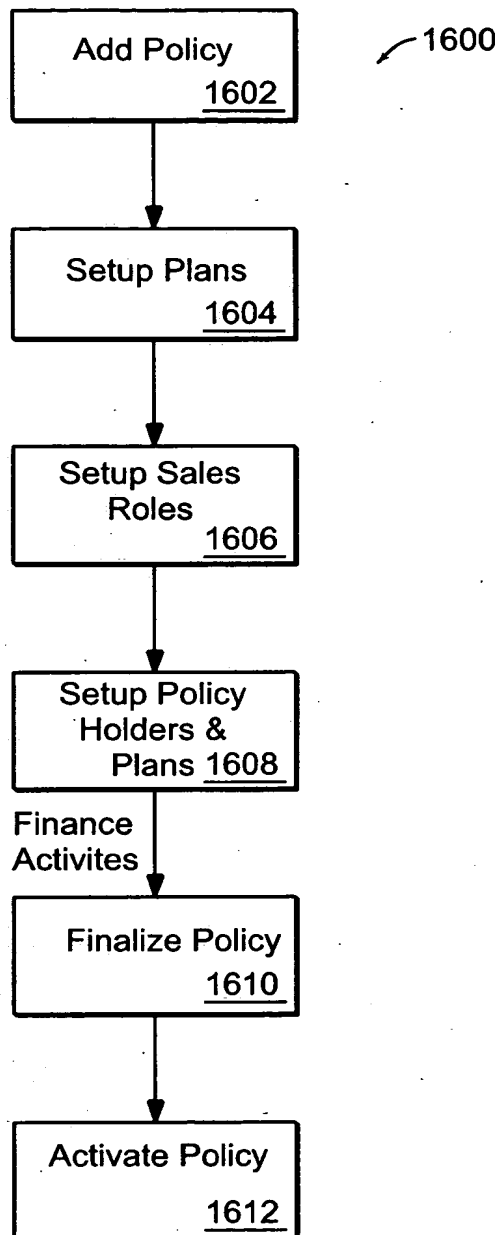


FIG. 28


1650

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Home History Print

Address https://secure.valuebenefits.com/ep_web/powerpage/main_frame.asp?sessionfailedirect=true Go



Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec

ID 14797 - Alex Mahony Heating & AC

Select a Policy

Add new Policy

Type	Term	Status	Carrier
Medical	02/01/2002 - 02/01/2003	Active	Oxford Plans

1652

Ready

Internet

FIG. 29

1700

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorite History Print

Address https://vbis2/ep_web/powerpage/main_frame.asp Go

ValueBenefits

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
 - Finish Account
 - Account Info
 - View Invoices
 - View Payments
 - View Policies
 - Discount Cards
 - Account Access
 - BOR Setup
 - Billing Dept.
 - Carrier Details
 - Finance

ID 29 - Joe's Garage II

Policy Information

Edit the fields below and push save when you are finished.

Policy Information

Policy Name:

Commission From:

Policy Num:

Commission To:

Effective From: 11/1/2002

Account Type: In House Rates

Effective To: 11/1/2003

Carrier: Oxford

Billing Address

Address 1: 50 Freedom Street

Address 2:

City: New York

State: NY

Zip code: 10020

SAVE

Ready Local Intranet

FIG. 30

1720

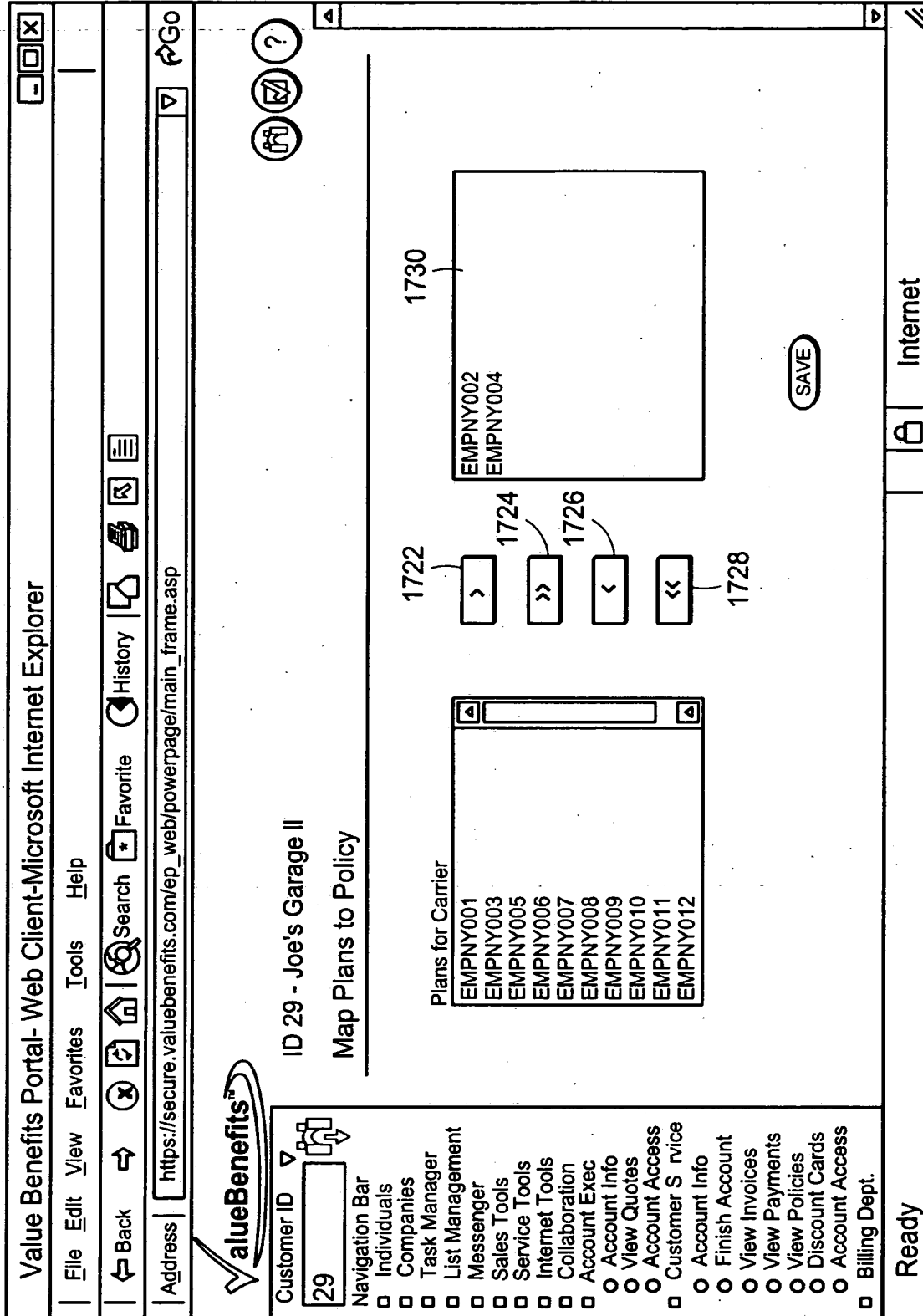


FIG. 31


1750

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Home Search *Favorite History Print

Address Go

 ID 29 - Joe's Garage

Assign Policy Roles

Select which broker will have a role on this policy. Select a role, then a broker and push the Add Below button.

Customer ID	Navigation Bar	*Roles	*Brokers
29	<ul style="list-style-type: none"><input type="checkbox"/> Individuals<input type="checkbox"/> Companies<input type="checkbox"/> Task Manager<input type="checkbox"/> List Management<input type="checkbox"/> Messenger<input type="checkbox"/> Sales Tools<input type="checkbox"/> Service Tools<input type="checkbox"/> Internet Tools<input type="checkbox"/> Collaboration<input type="checkbox"/> Account Exec<input type="checkbox"/> Customer Service<input type="checkbox"/> Finish Account<input type="checkbox"/> Account Info<input type="checkbox"/> View Invoices<input type="checkbox"/> View Payments<input type="checkbox"/> View Policies<input type="checkbox"/> Discount Cards<input type="checkbox"/> Account Access<input type="checkbox"/> BOR Setup<input type="checkbox"/> Billing Dept.<input type="checkbox"/> Carrier Details<input type="checkbox"/> Finance	<div>Account Executive</div> <div>Client Manager</div>	<div>Conni McMahon</div> <div>Rosemarie Connell</div> <div>Bryan Allan</div> <div>Jim Gagner</div> <div>Dan Johnson</div>

Add below

Done

Broker	Role	Start Date
--------	------	------------

Ready Local Intranet

FIG. 32

1780

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Home Search *Favorite History

Address https://vbis2/ep_web/powerpage/main_frame.asp Go

ID 29 - Joe's Garage
Policy Setup

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
- Finish Account
- Account Info
- View Invoices
- View Payments
- View Policies

Enrollee(First Middle Last Name)	Gender	DOB	SSN	Plan	Coverage
Joe Smith	Male	1/1/1955	999999999	OXFNY001	Individual(Ind)
Mark Hammel	Male	1/1/1955	999999999	OXFNY001	Ind + Spouse
Jame Hammel	Female	1/1/1955	999999999	OXFNY003	Family

Add

Employees

Update

The employees below can added to the policy by selecting the employee and clicking "Attach"

Attach

Ready Local Intranet

FIG. 33

1850

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back

Forward

Search

History

Favorite

Home

Address https://vbis2/ep_web/powerpage/main_frame.asp Go

ValueBenefits™

Customer ID 29

Navigation Bar

☐ Individuals
 ☐ Companies
 ☐ Task Manager
 ☐ List Management
 ☐ Messenger
 ☐ Sales Tools
 ☐ Service Tools
 ☐ Int met Tools
 ☐ Collaboration
 ☐ Account Exec
 ☐ Customer Service
 ☐ Billing Dept.
 ☐ Carrier Details
 ☐ Finance

ID 29 - Joe's Garage

Select a Policy

Account Name: Joe's Garage

CIN: 29

Policy Type	Carrier	Eff. From	Eff. To	Commissions	Schedule	Status
Medical	Oxford	1/1/2002	1/1/2003		Oxford Schedule	Pending
Medical	Oxford	1/1/2002	1/1/2003		Oxford Schedule	In Progress
Medical	Oxford	1/1/2002	1/1/2003	1/1/2002	Oxford Schedule	In Progress

1854

1852

Ready Local Intranet

FIG. 34

1870

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorite History

Address | https://vbis2/ep_web/powerpage/main_frame.asp

Go

ValueBenefits

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
- Billing Dept.
- Carrier Details
- Finance
- Finance Setup

ID 29 - Joe's Garage

Policy Billing Information

Edit the fields below and push save when you are finished.

Policy Information

Policy Name: Medical Policy

Policy Num: OXF20556

Effective From: 1/1/2002

Effective To: 1/1/2003

Policy Status: Pending

Commission From: 01/01/2002

Commission To: 12/31/2002

Billing Type: Standard

Schedule: Oxford Schedule

Remit Type: Gross

Billing Address

Address 1: 50 Freedom Street

Address 2:

City: New York

State: NY

Zip code: 10020

Zipcode: 10020

Tier Level: 4

Group Size: 3

State: NY

SAVE

Ready

Local Intranet

FIG. 35

1902

FIG. 36

1920

Value Benefits Portal- Web Client-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search * Favorite History Home

Address https://vbis2/ep_web/powerpage/main_frame.asp Go

valueBenefits™

Customer ID 29

Navigation Bar

- Individuals
- Companies
- Task Manager
- List Management
- Messenger
- Sales Tools
- Service Tools
- Internet Tools
- Collaboration
- Account Exec
- Customer Service
- Billing Dept.
- Carrier Details
- Finance
- Finance Setup

ID 29 - Joe's Garage

Current Enrollment

Account Name	Joe's Garage
Carrier	Oxford
Policy Type	Medical
Account Type	In House Rates
Policy Name	
Policy Num	

Current

Update

Employee
Date of Birth
SSN
Plan
Plan Desc
Coverage
Rate
Effective From
Effective To
Last Invoiced

Jame Hammel
1/1/1955
999999999
OXFNY003

Family
964.77
1/1/2002

OXFNY003 \$20 OVP. \$0 inp.
Family
964.77
1/1/2002

SAVE

Ready

Local Intranet

FIG. 37

1950

VBI Portal Login-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search * Favorite History Print

Address <https://secure.valuebenefits.com/VBIWeb/login.asp?logout=1> Go

HOME - LOGIN - PRIVACY POLICY - CONTACT

valueBenefits™

The small business insurance superstore.

Login

Login:

Password:

Login:

Ready Internet

FIG. 38

-1972

FIG. 39

2000

https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp-Microsoft Internet Explorer


File Edit View Favorites Tools Help

Back Forward Home Search Favorite History Print

Address https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp

Go

HOME - LOG IN - PRIVACY POLICY - CONTACT US - SITE MAP



The small business insurance superstore.

My Account

Please note that all fields marked with a * are required.

Profiles

[Company Profiles](#)

[Employee Profiles](#)

[Comparisons](#)

[Create New](#)

[Review Previous](#)

[Enrollment](#)

[Enrollment Wizard](#)

[Current Enrollment](#)

[Discount Cards](#)

Company Information

*Company Name

*Contact Name

*Address 1

Address 2

*City, State Zipcode

*County

Telephone

Fax

Email

Website

Billing Information

*Address 1

Address 2

*City, State Zipcode

Joe's Garage

Joseph Smith

50 Freedom Street

2

New York NY 10020

New York

50 Freedom Street

2

New York NY 10020

SAVE

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250 Commercial St.

Worcester, MA 01608

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(508) 831-3130 fax

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Done Local Intranet

FIG. 40

2020

<https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp-Microsoft Internet Explorer>

File Edit View Favorites Tools Help

Address

<https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp>

Go

HOME - LOG IN - PRIVACY POLICY - CONTACT US - SITE MAP

The small business insurance superstore.

My Account

Profiles

Company Profiles

Employee Profiles

Comparisons

Create New

Review Previous

Enrollment

Enrollment Wizard

Current Enrollment

Discount Cards

Employee List

Company: Joe's Garage

Below is of all of your current employees. To change an employee's address or information press the Edit button. To change an employee's dependent information, press the Dependents link, or to terminate an employee press the Terminate link.

Add Employee

Employee	Address	Edit	Dependents
Larry T Bird	475 Tallyhoe Drive, Bronx, NY 10023	Edit	Dependents
Keith Brown	450 Tallyhoe Drive, New York, NY 10025	Edit	Dependents
Barry Goldsmith	52 Peabody Avenue, Bronx, NY 10023	Edit	Dependents
Joe Smith	34 Gentle Hill, New York, NY 10020	Edit	Dependents
Cindy Smith	45 Lovelane, Bronx, NY 10020	Edit	Dependents
George Tapely	78 Gentle Hill, New York, NY 10025	Edit	Dependents

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Internet

FIG. 41

2050


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File Edit View Favorites Tools Help	
Back Forward Stop Search History Home	
Address https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp	Go
HOME - LOGIN - PRIVACY POLICY - CONTACT US - SITE MAP	
<div><p>The small business insurance superstore.</p></div>	
<u>My Account</u>	Enter Company Information
<u>Profiles</u>	* Coverage Start Date <input type="text"/> (mm/dd/yyyy)
<u>Company Profiles</u>	Company Name <input type="text"/> Joe's Garage
<u>Employee Profiles</u>	* Employee Count <input type="text"/> 0 (Total number of employees seeking insurance)
<u>Comparisons</u>	Enter Contact Information
<u>Create New</u>	Contact First Middle Last <input type="text"/>
<u>Review Previous</u>	Contact E-mail <input type="text"/>
<u>Enrollment</u>	Address 1 <input type="text"/> 50 Freedom Street
<u>Enrollment Wizard</u>	Address 2 <input type="text"/> # 2
<u>Current Enrollment</u>	City, State *Zipcode <input type="text"/> New York <input type="text"/> NY 10020
<u>Discount Cards</u>	* County <input type="text"/> New York <input type="text"/>
	Telephone & Extension <input type="text"/>
	Fax <input type="text"/>
	Website <input type="text"/>
	<input type="button" value="CONTINUE"/>
Value Benefits Insurance Agency, Inc. (877) 941-5005 toll free 250 Commercial St. (508) 831-3130 fax Worcester, MA 01608 www.valuebenefits.com	
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Done	Internet

FIG. 42

2070


https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp-Microsoft Internet Explorer																													
File Edit View Favorites Tools Help																													
Back Forward Stop Search * Favorite History																													
Address https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp Go																													
HOME - LOGIN - PRIVACY POLICY - CONTACT US - SITE MAP																													
<div><p>The small business insurance superstore.</p><p>Step 2: Enter Employee Information</p><p>Quote Number: 490210-552</p><p>Please fill in the information below for each employee and press the Continue button to proceed. Please note that all fields marked with a * are required. The Employee name is not required and can be left as Employee #.</p><p>Employee Details</p><table border="1"><thead><tr><th>*Name</th><th>*Date of Birth (mm/dd/yyyy)</th><th>*Gender</th><th>*Coverage Type</th></tr></thead><tbody><tr><td>Bird, Larry T</td><td>12/7/1558</td><td>Male</td><td>Individual Remove</td></tr><tr><td>Brown, Keith</td><td>8/8/1956</td><td>Male</td><td>Individual Remove</td></tr><tr><td>Goldsmith, Barry</td><td>5/5/1975</td><td>Male</td><td>Individual Remove</td></tr><tr><td>Smith, Cindy</td><td>4/4/1945</td><td>Female</td><td>Individual Remove</td></tr><tr><td>Smith, Joe</td><td>4/4/1945</td><td>Male</td><td>Individual Remove</td></tr><tr><td>Tapely, George</td><td>5/5/1955</td><td>Male</td><td>Individual Remove</td></tr></tbody></table><p>Add 0 Employees</p><p>CONTINUE</p></div>		*Name	*Date of Birth (mm/dd/yyyy)	*Gender	*Coverage Type	Bird, Larry T	12/7/1558	Male	Individual Remove	Brown, Keith	8/8/1956	Male	Individual Remove	Goldsmith, Barry	5/5/1975	Male	Individual Remove	Smith, Cindy	4/4/1945	Female	Individual Remove	Smith, Joe	4/4/1945	Male	Individual Remove	Tapely, George	5/5/1955	Male	Individual Remove
*Name	*Date of Birth (mm/dd/yyyy)	*Gender	*Coverage Type																										
Bird, Larry T	12/7/1558	Male	Individual Remove																										
Brown, Keith	8/8/1956	Male	Individual Remove																										
Goldsmith, Barry	5/5/1975	Male	Individual Remove																										
Smith, Cindy	4/4/1945	Female	Individual Remove																										
Smith, Joe	4/4/1945	Male	Individual Remove																										
Tapely, George	5/5/1955	Male	Individual Remove																										
My Account Profiles Company Profiles Employee Profiles Comparisons Create New Review Previous Enrollment Enrollment Wizard Current Enrollment Discount Cards	<div><p>Value Benefits Insurance Agency, Inc. 250 Commercial St. Worcester, MA 01608</p><p>(877) 941-5005 toll free (508) 831-3130 fax www.valuebenefits.com</p><p>For more information send us an email at info@valuebenefits.com ©2001 Value Benefits Insurance Agency, Inc.</p></div> <p>Done</p>																												

FIG. 43


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Step 3: Enter Employee Contributions

Quote Number: 490210-752

As an Employer, you can choose to contribute to your Employee's medical coverage. For each group level you wish to support, please specify your contribution amount, as either a dollar or percentage value.

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Flat Fee (\$): Straight dollar contribution

% of Cost : Straight percentage of contribution

% of Lowest Cost Individual Plan: Percentage of Individual Plan Cost

Group Level	Contribution Type	Amount
Individual	Flat Fee (\$)	50
I + Spouse	Flat Fee (\$)	60
I + Child(ren)	Flat Fee (\$)	70
Family	Flat Fee (\$)	80

That's it! You're ready to [Compare Plans](#) and, we're standing by to explain your options to you toll free at (877) 941-5005

[COMPARE PLANS](#)

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FIG. 44

FIG. 45

2200

Quote Details for Plan -Microsoft Internet Explorer

File Edit View Favorites Tools Help

Detail By Employee

CLOSE

Oxford

OXFNY008 : \$15 OVP, \$25 OVS, \$100 INP, \$75 ER // \$2000 DED, 30% CO, \$5000OOP // No Rx
 In network benefits are \$15 for an office visit to primary care physician, \$25 for an office visit to a specialist, \$100 for in patient hospitalization and \$75 for emergency room services, which is waived if admitted. Out of Network benefits are \$2000 deductible, 30% coinsurance and \$5000 annual out of pocket maximum per individual.

	Employee	Coverage	Rate	Employer Contribution	Employee Contribution
Bird, Larry T	Individual	Individual	\$216.09	\$50.00	\$166.09
Brown, Keith	Individual	Individual	\$216.09	\$50.00	\$166.09
Goldsmith, Barry	Individual	Individual	\$216.09	\$50.00	\$166.09
Smith, Cindy	Individual	Individual	\$216.09	\$50.00	\$166.09
Smith, Joe	Individual	Individual	\$216.09	\$50.00	\$166.09
Tapely, George	Individual	Individual	\$216.09	\$50.00	\$166.09
Total			\$1,296.54	\$300.00	\$996.54

Composite Totals

Individual

\$216.09

Individual + Spouse

-

Individual + Child(ren)

-

Family

-

These rates are based upon information you've provided for this analysis. Premium rates were generated based upon information provided by the insurance companies to Value Benefits. Final rates will be calculated based on validation of your information and verification by the insurance company. In completing this application, the applicant understands and agrees that Value Benefits is an intermediary only and makes no representation or promise with respect to the insurance to be purchased or the extent or nature of benefits to be provided.

FIG. 46

FIG. 47

FIG. 47

2250

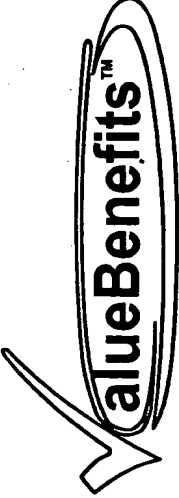
<https://secure.valuebenefits/vbiweb/portal/portal.asp> - Microsoft Internet Explorer

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The small business insurance superstore.

Employer Enrollment

Once you have completed each of the required sections below, press the complete button to notify Value Benefits to finalize your application.

Complete the Following Sections	
< Required >	Employer Demographics
< Required >	Employer Information
< Required >	Employer Contribution
< Required >	Employee Information
< Required >	Employee Plan Chooser
< Optional >	Insurance Forms

COMPLETE

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[Employee Profiles](#)

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FIG. 48

2270


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[Create New](#)
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[Enrollment](#)
[Enrollment Wizard](#)
[Current Enrollment](#)
[Discount Cards](#)

The small business insurance superstore.

Please note that all fields marked with a * are required.

Company Address

*Company Name

Joe's Garage

*Contact Name

Joseph Smith

*Address 1

50 Freedom Street

*Address 2

2

*City, State, Zip

New York NY 10020

*County

New York

Telephone

Fax

Email

Website

Billing Address

*Address 1

50 Freedom Street

Address 2

2

*City, State, Zip

New York NY 10020

SAVE & CONTINUE

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Done

Internet

FIG. 49

2300

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[Address](#) [Go](#)

<https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp>

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[Profiles](#)
[Company Profiles](#)
[Employee Profiles](#)
[Comparisons](#)
[Create New](#)
[Review Previous](#)
[Enrollment](#)
[Enrollment Wizard](#)
[Current Enrollment](#)
[Discount Cards](#)

Company Information

Step 2 of 6

Back << Home >> Next

Please note that all fields marked with a* are required.

*Tax ID (TIN)	<input type="text" value="043309998"/>	No - Required
*Business Start Date	<input type="text" value="10/1/2001"/>	(mm/dd/yyyy)
*Number of Employees	<input type="text" value="6"/>	
*Policy Effective Date	<input type="text" value="3/1/2002"/>	(mm/dd/yyyy)
Employer SIC Code	<input type="text" value="5541"/>	SIC Wizard
Employee Probationary Period	<input type="text" value="Gasoline Service Station"/>	
	<input type="text" value="0"/>	

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FIG. 50

2350


https://secure.valuebenefits/vbiweb/portal/portal.asp -Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search History

Address | https://secure.valuebenefits.com/VBIWeb/Portal/Portal.asp Go

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The small business insurance superstore.

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Comparisons

Create New

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Enrollment Wizard

Current Enrollment

Discount Cards

Employer Contribution

Step 3 of 6 Back << Home >> Next

As an employer you can offer to contribute to your employees medical health costs.
Please select below the amount you wish to contribute per group level

Group	Contribution	Amount (\$ or %)
Individual (Ind)	Flat Fee	<input type="text" value="0"/>
Ind + Spouse	Flat Fee	<input type="text" value="0"/>
Ind + Child(ren)	Flat Fee	<input type="text" value="0"/>
Family	Flat Fee	<input type="text" value="0"/>

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FIG. 51

2370

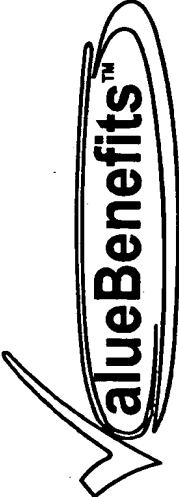
[https://secure.valuebenefits/vbiweb/portal/portal.asp -Microsoft Internet Explorer](#)

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[Employee Profiles](#)

[Comparisons](#)
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[Review Previous](#)
[Enrollment](#)
[Enrollment Wizard](#)
[Current Enrollment](#)
[Discount Cards](#)

Employee List

Step 4 of 6

Back << Home >> Next

Enter your employees below by clicking on the Add Employees link.

Add Employees

Name	DOB	SSN	Delete
1 Larry T Bird	12/7/1958	015698569	Delete
2 Keith Brown	8/8/1956	056236985	Delete
3 Barry Goldsmith	5/5/1975	145695698	Delete
4 Joe Smith	4/4/1945	014569856	Delete
5 Cindy Smith	4/4/1945	014526598	Delete
6 George Tapely	5/5/1955	015265985	Delete

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FIG. 52

2400

Docket No.: 082238.3000-101
Inventors: Patrick J. Houle, et al
Title: Integrated System...Insurance Products

Employee Plan Match -Microsoft Internet Explorer

File Edit View Favorites Tools Help

Y?

Search My Yahoo!

HOME - LOG IN - PRIVACY POLICY - CONTACT US - SITE MAP

The small business solution

New Enrollment

Complete New Enrollment

Employee Plan Match

Step 6 of 7

Back << Home >> Next

Need Help?
For questions
or
problems
call us
toll free at
(877)941-5005

For each employee, please select the employee's coverage and plan. Once you have completed this step, continue to the next step to print out the enrollment forms.

Name	Coverage	Plan Choice
Larry T Bird (015698569)	Individual (Ind)	10 OV.0 Inp. 35ER 10/20/30/Rx Vis
Keith Brown (056236985)	Ind + Spouse	10 OV.0 Inp. 35ER 10/20/30/Rx Vis
Barry Goldsmith (145695698)	Ind + Spouse	15 OV.500 Inp. 35ER No Rx
Joe Smith (014569856)	Family	10 OV.0 Inp. 35ER 10/20/30/Rx Vis
Cindy Smith (014526598)	Family	10 OV.0 Inp. 35ER 10/20/30/Rx Vis
George Tapely (015265985)	Ind + Child(ren)	15 OV.500 Inp. 35ER No Rx

SAVE & CONTINUE

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<https://www.valuebenefits.com/VBIWeb/enrollment/public/InsuranceForms.asp>

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Internet

FIG. 53

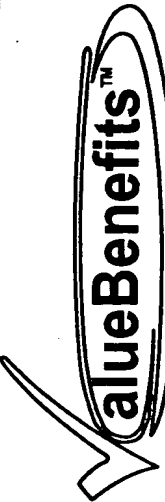
Insurance Forms - Microsoft Internet Explorer			
File	Edit	View	Favorites Tools Help
Y?	Search	Yahool Companion Sign in	My Yahoo! News ☆ Entertainment Sport Shopping Finance >>
HOME - LOG IN - PRIVACY POLICY - CONTACT US - SITE MAP			
<div style="text-align: center;">  <p>The small business solution</p> </div>			
<div style="display: flex; justify-content: space-between;"> <div> <p>New Enrollment</p> <p><u>Complete New Enrollment</u></p> </div> <div> <p>Enrollment Forms</p> <p>Step 7 of 7</p> <p>Back << Home >> Next</p> </div> </div>			
<p>Please print out each of the following forms, sign them and submit them to Value Benefits.</p>			
Employer Forms		Anthem BCBS Group Enrollment Form	
<p>Please print out each of the forms and distribute them to your employees. Have each employee sign the form and return it to you. Verify that the information is correct and include these forms in your package to Value Benefits.</p>			
Employee Forms		Anthem BCBS Member Enrollment Form	
Larry T Bird		Anthem BCBS Member Enrollment Form	
Keith Brown		Anthem BCBS Member Enrollment Form	
Barry Goldsmith		Anthem BCBS Member Enrollment Form	
Cindy Smith		Anthem BCBS Member Enrollment Form	
Joe Smith		Anthem BCBS Member Enrollment Form	
George Tapely		Anthem BCBS Member Enrollment Form	
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>Need Help?</p> <p>For questions or problems call us toll free at (877)941-5005</p> </div>			
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		Internet	

FIG. 54

2500

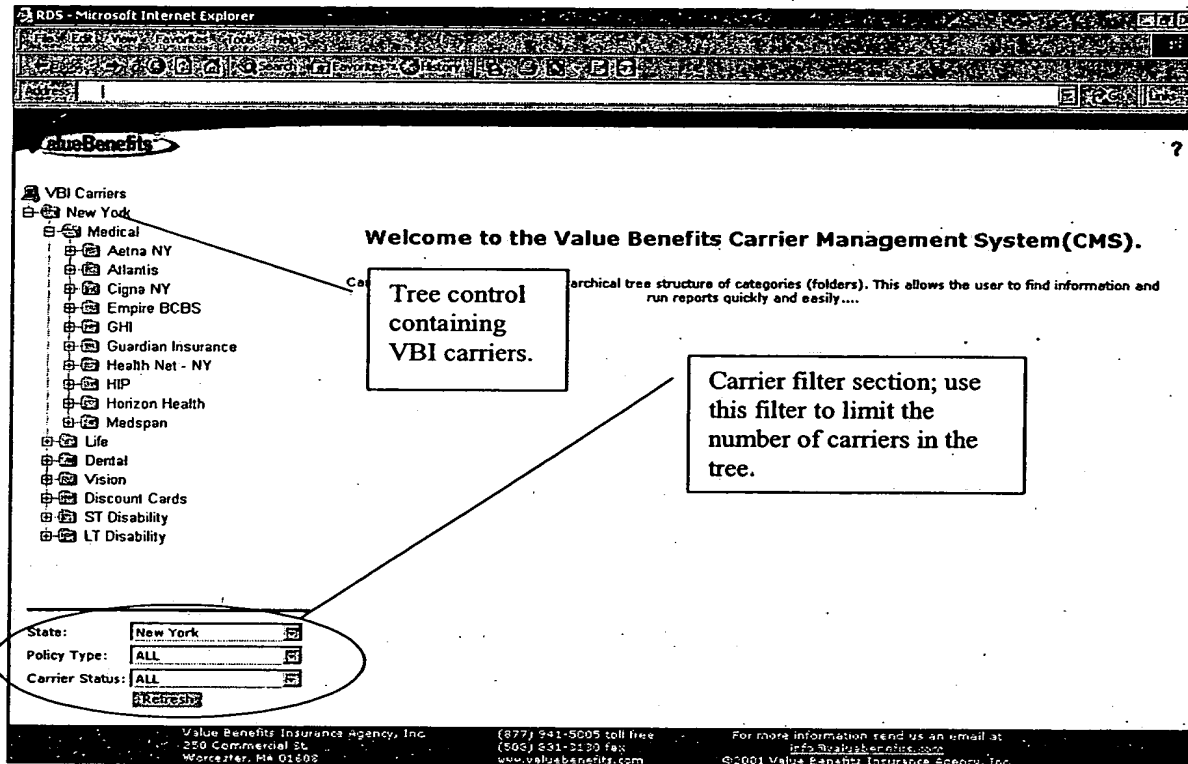


FIG. 55

2550

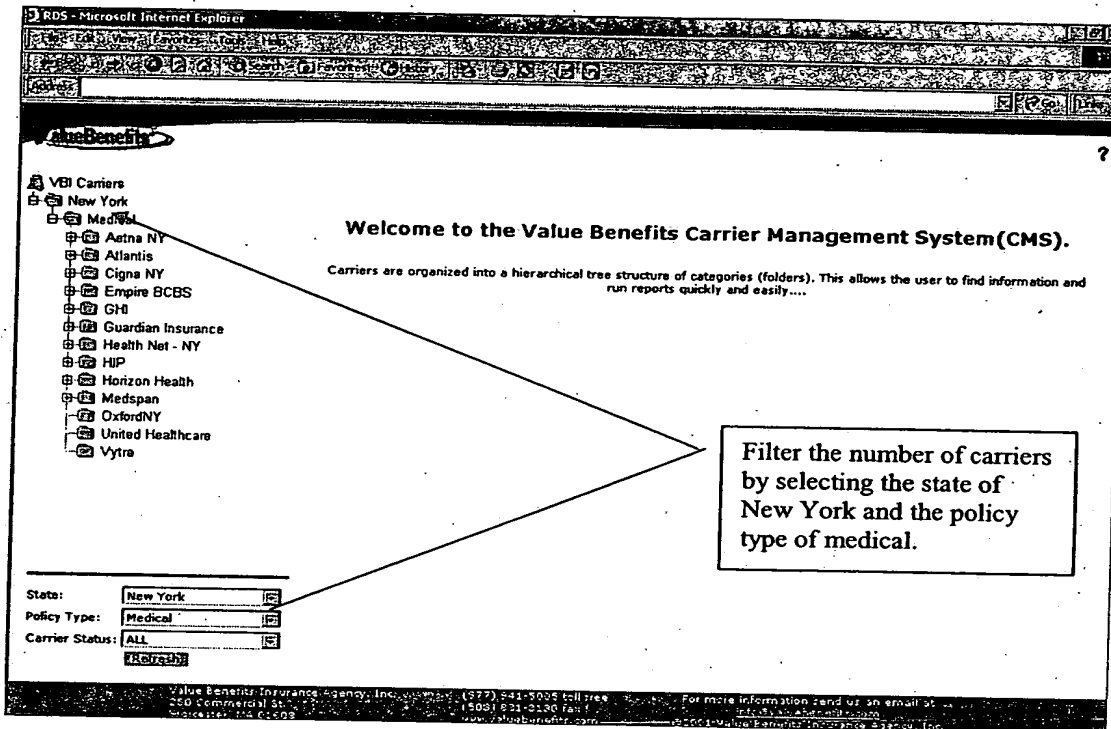


FIG. 56

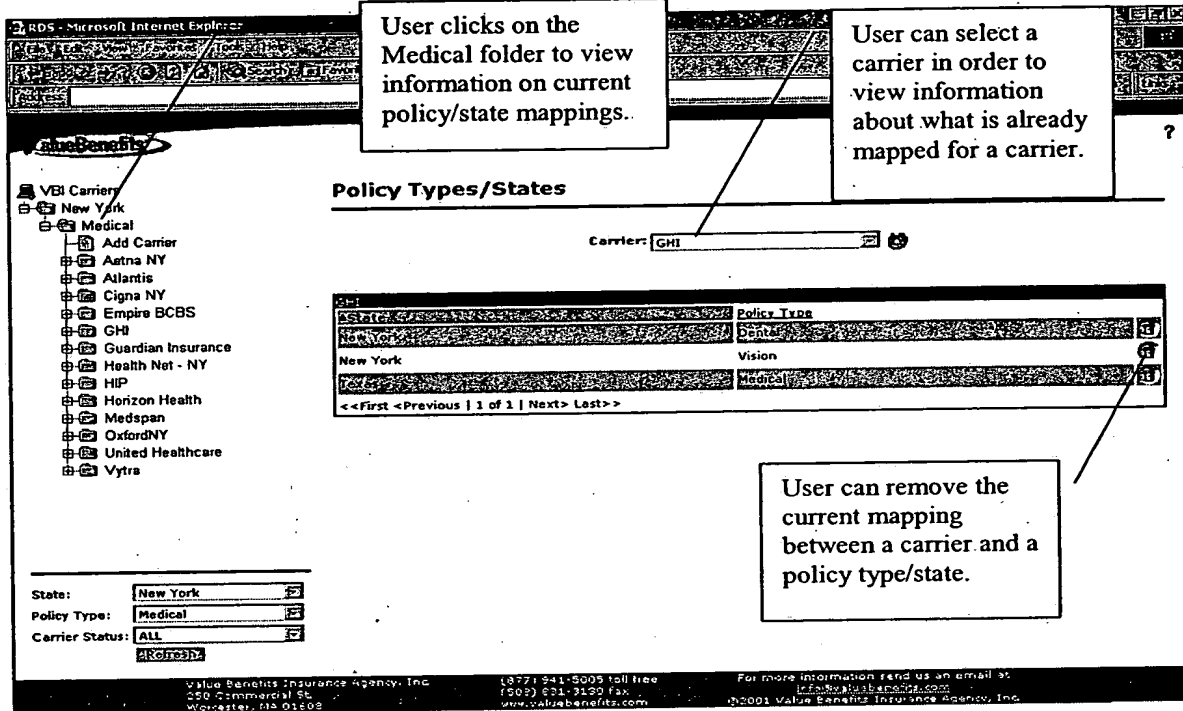
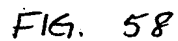


FIG. 57



2 2600

Click on the carrier name to view information specific to the carrier

GHI Carrier Details

Carrier Information

VBI Carrier Num: information

VBI Carrier Name: GHI

Address Type: information

Address 1: information

Address 2: information

City, State Zip: information

Contact First Name: information

Contact Last Name: information

Contact Method: information

Accounts

Commission Account

Chart Num: information

Chart Desc: information

Status: information

Holding Account

Chart Num: information

Chart Desc: information

Status: information

Payables Account

Chart Num: information

Chart Desc: information

Status: information

Income Account

Chart Num: information

Chart Desc: information

Status: information

Expense Account

Chart Num: information

Chart Desc: information

Status: information

Click the Edit link to change the carrier information or account information

State: New York

Policy Type: Medical

Carrier Status: ALL

Refresh

FIG. 59

3 2620

RDS - Microsoft Internet Explorer

Value Benefits

VBI Carriers

- New York
 - Medical
 - Add Carrier
 - Aetna NY
 - Allantia
 - Cigna NY
 - Empire BCBS
 - GHI
 - Plans
 - Regions
 - Plan Rates
 - OE
 - Plan Docs
 - Tiers
 - Guardian Insurance
 - Health Net - NY
 - HIP
 - Horizon Health
 - Medspan
 - OxfordNY
 - United Healthcare

Edit Carrier Details

Please fill out the form below and push Save & Continue when done.

VBI Carrier Num:

VBI Carrier Name:

Address Type:

Address 1:

Address 2:

City, State Zip: MA

Contact First Name:

Contact Last Name:

Contact Method:

Carrier Logo Path:

Status: ☐

State:

Policy Type:

Carrier Status:

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FIG. 60

2640

RDS - Microsoft Internet Explorer

Value Benefit Insurance Agency, Inc.

Edit GHI Carrier Accounts

Please fill out the form below and push Save.

VBI Carriers

- New York
 - Medical
 - Add Carrier
 - Aetna NY
 - Atlantis
 - Cigna NY
 - Empire BCBS
 - GHI
 - Plans
 - Regions
 - Plan Rates
 - QE
 - Plan Docs
 - Tiers
 - Guardian Insurance
 - Health Net - NY
 - HIP
 - Horizon Health
 - Medspan
 - OxfordNY
 - United Healthcare

State: **New York**

Policy Type: **Medical**

Carrier Status: **ALL**

Commission Account

Chart Num:

Chart Desc:

Status: ☐

Holding Account

Chart Num:

Chart Desc:

Status: ☐

Payables Account

Chart Num:

Chart Desc:

Status: ☐

Income Account

Chart Num:

Chart Desc:

Status: ☐

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FIG. 61

2660

Click on Plans under a given carrier in order to view and edit plans information.

Search for plan(s)
 Effective On: 11/1/2002
 Group Level: Please select one

Plan ID	Plan Desc	Grouping Level	Effective Range	Status
CIGNY001	\$20 OVP, \$500 INP, \$50 ER // RX \$10 GEN, \$20 PFD, \$40 BRD	HMO	10/1/2001 -	Active
CIGNY002	\$20 OVP, \$500 INP, \$50 ER // \$1500 DED, 50% CO, \$10000 OOP // RX \$10 GEN, \$20 PFD, \$40 BRD	POS		
CIGNY003	OA // \$20 OVP, \$500 INP, \$50 ER // RX \$10 GEN, \$20 PFD, \$40 BRD	HMO		
CIGNY004	OA // \$20 OVP, \$500 INP, \$50 ER // RX \$10 GEN, \$20 PFD, \$40 BRD	POS		

Filter the plans selection. (Note that state, policy type, and carrier are automatically filtered.)

Edit a plan by clicking on the link.

State: NY
 Policy Type: Please select one
 Carrier Status: Please select one

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 540 Commercial Dr.
 Providence, RI 02908

FB. 62

2680

CMS - Carrier Management System - Microsoft Internet Explorer

Address: https://Mkt3/oms/CMS.asp

Value Benefits

Add Plan (CIGNY)

Click on the Add Plans action node to add a plan.

Please fill out the form below and push Save when done.

Plan Num: CIGNY010

Export Num:

Product Type: Please select one

Plan Desc:

Invoice Desc:

Policy Type: Medical

Effective From:

Effective To:

Long Desc:

Sort Order: 10

Status: InActive

Cancel Save Save & Add Another Plan

State: NY

Policy Type: Please select one

Carrier Status: Please select one

Save & Add Another Plan

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FIG. 63

2700

CMS - Carrier Management System - Microsoft Internet Explorer

https://vbs3.com/CMS.asp

Add Plans (MDNY)

Click on the Adds Plans action node to add plans.

After filling out the common information, the users should click Save & Continue.

Please fill out the form below and push Save when done.

Num of Plans: 5
Product Type: HMO
Policy Type: Medical
Effective From: 1/1/2001
Effective To: 1/31/2001
Status: InActive

Cancel Save & Continue

State: NY
Policy Type: Please select one
Carrier Status: Please select one
Refresh

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FIG. 64A

CMS - Carrier Management System - Microsoft Internet Explorer

https://vbs3.com/CMS.asp

Edit Plans (MDNY)

Users then enter information that applies to each plan.

Please fill out the form below and push Save when done.

Plan Num	Export Num	Product Type	Policy Type	Effective From	Effective To	Sort Order	Status
MDNY001		HMO	Medical	1/1/2001	1/31/2001	1	InActive
MDNY002		HMO	Medical	1/1/2001	1/31/2001	2	InActive
MDNY003		HMO	Medical	1/1/2001	1/31/2001	3	InActive

State: NY
Policy Type: Please select one
Carrier Status: Please select one
Refresh

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2720

FIG. 64B

2740

ROS - Microsoft Internet Explorer

Value Benefits

Edit Plan Details

Please fill out the form below and push Save when done.

Carrier: GHI

Plan Num: GHI4343

Export Num: blah, blah, blah

Product Type: PPO ☒

Plan Desc: blah, blah, blah

Invoice Desc: blah, blah, blah

Policy Type: Medical ☒

Effective From: 1/1/2002

Effective To: 1/1/9999

Long Desc:

Status: Active

State: New York

Policy Type: Medical

Carrier Status: ALL

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FIG. 65

2760

3

CMS - Carrier Management System - Microsoft Internet Explorer

https://m33/jms/CMS.asp

Value Benefits

- GHNY
- GMONY
- GUONY
- HEANY
- HHNY
- HIPNY
- MDNY
- Plans
 - Add Plan
 - Add Plans
 - Edit Plans
 - Activation
- Regions
- Plan Rates
- OE
- Plan Docs
- Tiers
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
- UHCNY

Edit Plans(MDNY)

Search for plan(s) to edit
Effective On: 1/1/2001

Plan Num	Plan Desc	Grouping Level	Effective Range	Status
MDNY001		HMO	1/1/2001 - 1/31/2001	InActive
MDNY002		HMO	1/1/2001 - 1/31/2001	InActive
MDNY003		HMO	1/1/2001 - 1/31/2001	InActive
MDNY004		HMO	1/1/2001 - 1/31/2001	InActive
MDNY005		HMO	1/1/2001 - 1/31/2001	InActive
MDNY999	Non-standard Plan	999	1/1/2000 - 1/1/9999	Active

<First <Previous 1 of 1 >Next> Last>

State: NY
Policy Type: Please select one
Carrier Status: Please select one
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FIG. 66A

CMS - Carrier Management System - Microsoft Internet Explorer

https://m33/jms/CMS.asp

Value Benefits

- GHNY
- GMONY
- GUONY
- HEANY
- HHNY
- HIPNY
- MDNY
- Plans
 - Add Plan
 - Add Plans
 - Edit Plans
 - Activation
- Regions
- Plan Rates
- OE
- Plan Docs
- Tiers
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
- UHCNY

Edit Plans (MDNY)

Please fill out the form below and push Save when done.

Plan Num	Export Num	Product Type	Policy Type	Effective From	Effective To	Sort Order	Status
MDNY001		HMO	Medical	1/1/2001	1/31/2001	1	InActive
MDNY002		HMO	Medical	1/1/2001	1/31/2001	2	InActive
MDNY003		HMO	Medical	1/1/2001	1/31/2001	3	InActive

State: NY
Policy Type: Please select one
Carrier Status: Please select one
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FIG. 66B

2800

MS - Carrier Management System - Microsoft Internet Explorer

Address: http://msstonejog.asp

Plans Activation (MDNY)

Search for plan(s) for activation
Effective On:

Enter a new effective to date and status. Check all plans to be updated.
Effective To: Status:

Plan Name	Plan Desc	Grouping Level	Effective Range	Status
MDNY001			1/1/2001 - 1/31/2001	InActive
MDNY002		HMO	1/1/2001 - 1/31/2001	InActive
MDNY003		HMO	1/1/2001 - 1/31/2001	InActive
MDNY004		HMO	1/1/2001 - 1/31/2001	InActive
MDNY999	Non-standard Plan	999	1/1/2000 - 1/1/9999	Active

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG. 67

2820



Click on Regions to view and edit regions.

Filter by effective on date

Click on the region name to edit the region's detail information.

Click on the plans to edit the plans mapped to a region.

Click here to edit the counties for the region.

Region	Counties	Plans	Effective Range	Status
Oxford - Brooklyn/Queens	Kings, Queens	OXFNY001, OXFNY002, OXFNY003, OXFNY004, OXFNY005, OXFNY006, OXFNY007	10/1/2001 - 3/31/2003	Active
Oxford - Nassau	Nassau	OXFNY008, OXFNY009, OXFNY010, OXFNY011, OXFNY012, OXFNY013, OXFNY014	1/1/2000 - 1/1/2003	Active
Oxford - Putnam/Dutchess	Dutchess, Orange, Putnam	OXFNY015, OXFNY016, OXFNY017, OXFNY018, OXFNY019, OXFNY020, OXFNY021	1/1/2001 - 1/1/2003	Active

FIG. 68

2840

CMS - Carrier Management System - Microsoft Internet Explorer
https://vbk3jms/CMS.asp

Value Benefits

- GMUNY
- GUDNY
- HEANY
- HHHNY
- HIPNY
- MDNY
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
 - Plans
 - Regions
 - Add Regions
 - Activation
 - Plan Rates
 - QE
 - Plan Docs
 - Tiers
- UHCNY
- VYTNY
- ST Disability
- Vision

Add Region (OXFNY)

Please fill out the form below and push Save when done.

Region Name:

Region Type: ☐

Comments:

Status: ☐

State: ☐

Policy Type: ☐

Carrier Status: ☐

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FIG. 69

2860

CMS - Carrier Management System - Microsoft Internet Explorer

Address: https://Mbs3/one/CMS.asp

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- GMUNY
- GUDNY
- HEANY
- HHHNY
- HIPNY
- MDNY
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
 - Plans
 - Regions
 - Add Regions
 - Activation
 - Plan Rates
 - QE
 - Plan Docs
 - Tiers
- UHCNY
- VYTNY
- ST Disability
- Vision

Add Region's Counties (OXFNY)

Please map all the counties for this region and push Save when done.

Counties for NY	Counties mapped to Region Region1
Albany	Broome
Allegany	
Bronx	
Cattaraugus	
Cayuga	
Chautauque	
Chemung	
Chenango	
Clinton	
Columbia	

☐ Replace current records.
☐ Create new records.

Effective From: 1/1/2001
Effective To: 12/31/2001

Cancel Save

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG. 70

2880

CMS - Carrier Management System - Microsoft Internet Explorer

Address: https://Mib3/ons/CMS.asp

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- GMUNY
- GUDNY
- HEANY
- HHHNY
- HIPNY
- MDNY
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
 - Plans
 - Regions
 - Add Regions
 - Activation
 - Plan Rates
 - QE
 - Plan Docs
 - Tiers
- UHCNY
- YTYNY
- ST Disability
- Vision

Add Region's Plans (OXFNY)

Please map all the plans for this region and push Save when done.

Plans for OXFNY

OXFNY004
OXFNY005
OXFNY006
OXFNY007
OXFNY008
OXFNY009
OXFNY010
OXFNY011
OXFNY012
OXFNY013

Plans mapped to Region Region1

OXFNY002
OXFNY001
OXFNY003

☐ Replace current records.
☒ Create new records.

Effective From: 1/1/2001
Effective To: 12/31/2001

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG 71

2900



CMS - Carrier Management System - Microsoft Internet Explorer

https://MIS3/one/CMS.asp

Value Benefits

- GMUNY
- GUDNY
- HEANY
- HHINY
- HIPNY
- MDNY
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
 - Plans
 - Regions
 - Add Regions
 - Activation
 - Plan Rates
 - OE
 - Plan Docs
 - Tiers
- UHCNY
- VYTNY
- ST Disability
- Vision

Edit Region (OXFNY)

Please fill out the form below and push Save when done.

Region Name:

Region Type:

Comments:

Status:

State:

Policy Type:

Carrier Status:

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FIG. 72

2920

CMS - Carrier Management System - Microsoft Internet Explorer
https://mis3/cms/CMS.asp

Value Benefits

Region's Counties (OXFNY)

Please map all the counties for this region and push Save when done.

Counties for NY

- Albany
- Allegany
- Broome
- Cattaraugus
- Cayuga
- Cheautauque
- Chenango
- Clinton
- Columbia

Counties mapped to Region Oxford - Bronx

☐ Replace current records.
☒ Create new records.

Effective From: 10/1/2001
Effective To: 3/31/2003

State: NY
Policy Type: Please select one
Carrier Status: Please select one
Refresh

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FIG. 73

2940

CMS - Carrier Management System - Microsoft Internet Explorer

https://vbs3/cms/CMS.asp

ValueBenefits

Region's Plans (OXFNY)

Please map all the plans for this region and push Save when done.

Plans for OXFNY

OXFNY008
OXFNY009
OXFNY010
OXFNY011
OXFNY012
OXFNY013
OXFNY014
OXFNY015
OXFNY016
OXFNY017

Plans mapped to Region Oxford - Bronx

OXFNY001
OXFNY002
OXFNY003
OXFNY004
OXFNY005
OXFNY006
OXFNY007

☐ Replace current records.
☐ Create new records.

Effective From: 10/1/2001
Effective To: 3/31/2003

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG. 74

2960

CMS - Carrier Management System - Microsoft Internet Explorer

Address: https://mbs3.com/CMS.asp

Value Benefits

Regions Activation (OXFNY)

Search for region(s) for activation
Effective On: 1/1/2002

Effective To: 1/1/2003 Status: Active

Regions

Region	Counties	Plans	Effective Range	Status
Oxford - Brooklyn/Queens	Kings, Queens	OXFNY001, OXFNY002, OXFNY003, OXFNY004, OXFNY005, OXFNY006, OXFNY007	10/1/2001 - 3/31/2003	Active
Oxford - Nassau	Nassau	OXFNY001, OXFNY002, OXFNY003, OXFNY004, OXFNY005, OXFNY006, OXFNY007	10/1/2001 - 3/31/2003	Active
Oxford - Nassau	Nassau	OXFNY999	1/1/2000 - 1/1/9999	Active
Oxford - Nassau	Nassau	OXFNY001, OXFNY002, OXFNY003, OXFNY004, OXFNY005, OXFNY006, OXFNY007	10/1/2001 - 3/31/2003	Active

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG. 75

2980
↓

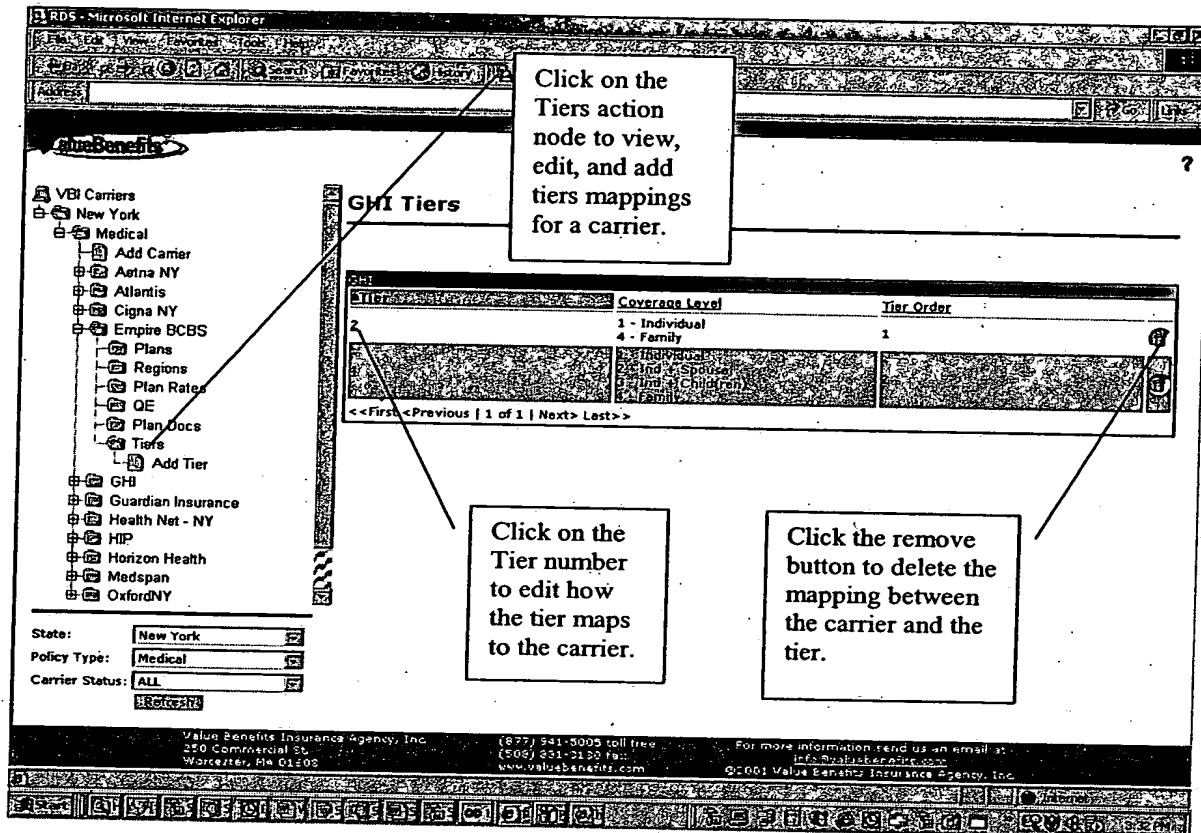


FIG. 76

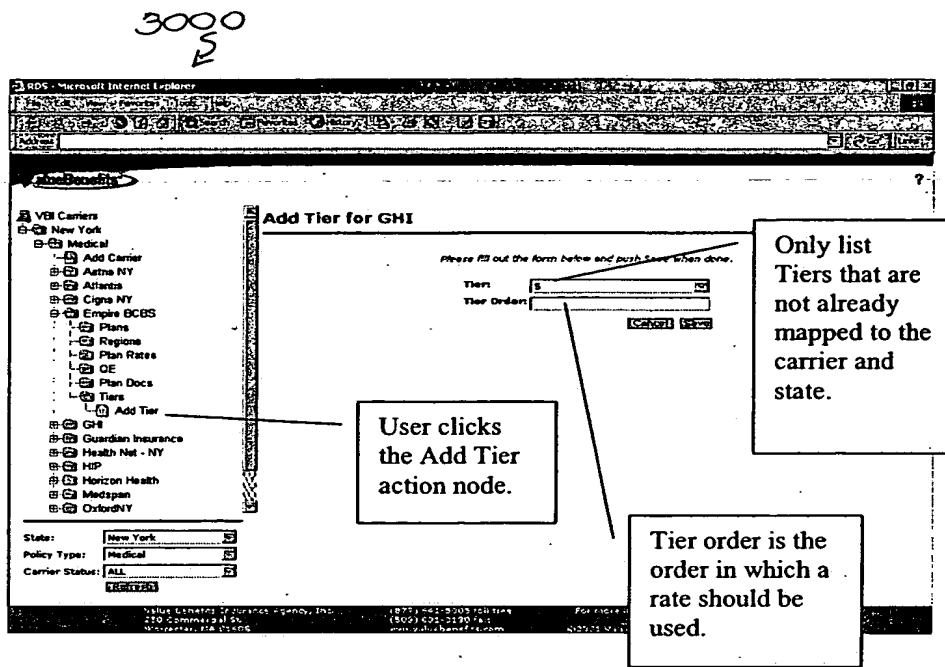


FIG. 77

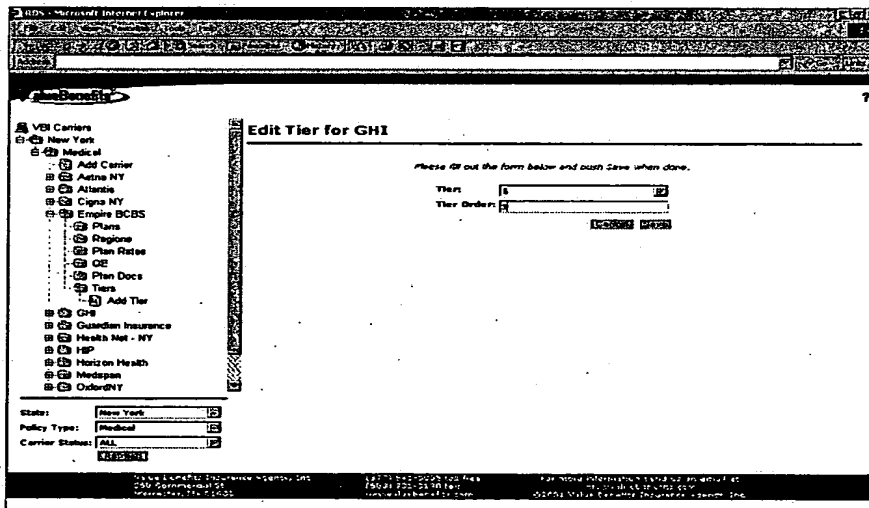


FIG. 78

3040

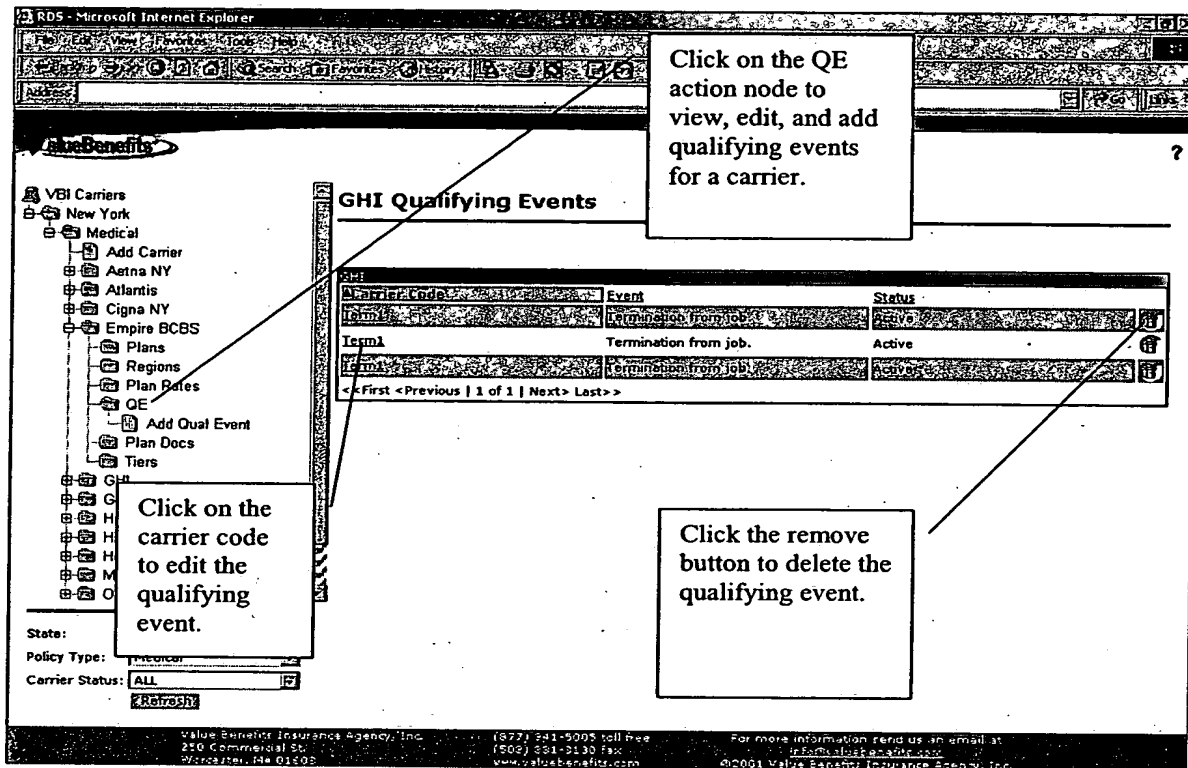


FIG 79

3060

Microsoft Internet Explorer

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FIG. 80

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FIG. 81

3100

Value Benefit Insurance Agency, Inc. - Microsoft Internet Explorer

Address: https://mlb3.com/OMS.asp

Plan Rates (OXFNY)

Search for rates
 Effective On: 1/1/2002
 Status: Please select one
 Plan: All

Users can filter the plan rates by selecting an effective on date, a plan and status.

Plan Name	VBI Plan	Group Size	Age Band	Gender	Tier Class	Individual (Ind)	Ind + Spouse Ind + Child(ren)
Oxford - Bronx	OXFNY002	2 - 50	0 - 999	4		328.140	
Oxford - Bronx	OXFNY003	2 - 50	0 - 999	4		312.140	
Oxford - Bronx	OXFNY004	2 - 50	0 - 999	4		415.780	
Oxford - Bronx	OXFNY005	2 - 50	0 - 999	4		551.810	
Oxford - Bronx	OXFNY006	2 - 50	0 - 999	4		336.810	
Oxford - Brooklyn/Queens	OXFNY001	2 - 50	0 - 999	4		381.390	
Oxford - Brooklyn/Queens	OXFNY003	2 - 50	0 - 999	4		308.7000	617.4000 308.3300
Oxford - Brooklyn/Queens	OXFNY005	2 - 50	0 - 999	4		345.4500	690.9000 656.3400

State: NY
 Policy Type: Please select one
 Carrier Status: Please select one
 Refresh

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FIG. 82

3120
↙

CMS - Carrier Management System - Microsoft Internet Explorer
https://mb3/cms/CMS.asp

Plan Rates Activation (OXFNY)

Search for rates for activation
Effective On: 1/1/2002

Active On: 12/1/2002 Status: InActive

State: NY
Policy Type: Please select one
Carrier Status: Please select one

Plan Num	Plan Desc	Status	Active Date
OXFNY001	\$10 OVP, \$10 INP, \$50 ER // \$250 DED, 30% CO, \$3500 OOP // RX \$7 GEN, \$20 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY002	\$15 OVP, \$0 INP, \$50 ER // \$500 DED, 30% CO, \$3500 OOP // RX \$7 GEN, \$20 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY003	\$20 OVP, \$0 INP, \$50 ER // \$1000 DED, 30% CO, \$2500 OOP // RX \$7 GEN, \$20 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY004	OA // \$10 OVP, \$0 INP, \$50 ER // \$250 DED, 20% CO, \$1250 OOP // RX \$5 GEN, \$15 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY005	\$20 OVP, \$0 INP, \$50 ER // \$1000 DED, 30% CO, \$2500 OOP // RX \$7 GEN, \$20 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY006	OA // \$20 OVP, \$0 INP, \$50 ER // \$1000 DED, 30% CO, \$2500 OOP // RX \$7 GEN, \$20 PFD, \$50 BRD	<input type="checkbox"/>	
OXFNY007	\$20 OVP, \$500 INP, \$50 ER // \$1000 DED, 30% CO, \$2500 OOP // No Rx	<input type="checkbox"/>	
OXFNY008	\$15 OVP, \$25 OVS, \$100 INP, \$75 ER // \$2000 DED, 30% CO, \$5000 OOP // No Rx	<input type="checkbox"/>	
OXFNY009	\$15 OVP, \$25 OVS, \$100 INP, \$75 ER // \$1000 DED, 30% CO, \$4000 OOP // No Rx	<input type="checkbox"/>	
OXFNY010	\$15 OVP, \$25 OVS, \$100 INP, \$75 ER // \$1000 DED, 30% CO, \$4000 OOP // RX \$100	<input type="checkbox"/>	

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FIG. 83

3140



CMS - Carrier Management System - Microsoft Internet Explorer
https://mbsc/cms/CMS.asp

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- GUANY
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- HIHNY
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 - Regions
 - Plan Rates
 - Upload
 - Import into VBIS
 - Activation
 - QE
 - Plan Docs
 - Tiers
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
- UHCNY
- VYTNV
- ST Disability
- Vicinn

Upload Plan Rates Excel Files (MDNY)

Upload up to five Excel files. Please note that this process may take several minutes.
Also, please make sure that the sheet name = **PlanRates**
And the column headers are name the following:

strCarrierPlanNum	IntAgeFrom	IntAgeTo	IntEmpCountFrom
IntEmpCountTo	bytCoverageLevel	strGender	strRegionName
strSICCode	curRate	bytTierClass	

XLS Sheet One:

XLS Sheet Two:

XLS Sheet Three:

XLS Sheet Four:

XLS Sheet Five:

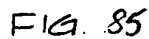
State:

Policy Type:

Carrier Status:

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FIG. 84



3180

3180

3

CMS - Carrier Management System - Microsoft Internet Explorer

https://Vib3/one/CMS.asp

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Import Rates Step 1 (MDNY)

Please fill out the form below and push Save & Continue when done.

Effective: 2002

Active Date:

Status: InActive

Cancel Save & Continue

State: NY

Policy Type: Please select one

Carrier Status: Please select one

Refresh

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FIG. 86

3200

CMS - Carrier Management System - Microsoft Internet Explorer
Address: https://vbi3/cms/CMS.asp

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- MDNY
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 - Add Regions
 - Activation
 - Plan Rates
 - Upload
 - Import into VBIS
 - Activation
 - OE
 - Plan Docs
 - Tiers
- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
- UHCNY

Import Rates Step 2 (MDNY)

Please map the regions found in the XLS sheet with the regions in the system.

Regions found in XLS	Regions In System
Asimetry - Region 1	Region2
Mid-Hudson	Region2
TestAETNY925	Region2

Save Cancel Save & Continue

State: NY
Policy Type: Please select one
Carrier Status: Please select one

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FIG. 87

3220

CMIS - Carrier Management System - Microsoft Internet Explorer

Address: https://mb3/cma/CMIS.asp

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Import Rates Step 3 (MDNY)

Please map the plans found in the XLS sheet with the plans in the system.

Plans found in XLS	Plans in System
EMPNY003	MDNY999
EMPNY004	MDNY999
EMPNY005	MDNY999
EMPNY008	MDNY999
EMPNY009	MDNY999
EMPNY010	MDNY999
EMPNY011	MDNY999
EMPNY012	MDNY999
EMPNY013	MDNY999
EMPNY014	MDNY999
EMPNY015	MDNY999
EMPNY016	MDNY999
EMPNY017	MDNY999
EMPNY018	MDNY999

State: NY
Policy Type: Please select one
Carrier Status: Please select one
Refresh

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FIG. 88

3240

CMS - Carrier Management System - Microsoft Internet Explorer

Address: https://mkt3/cms/CMS.asp

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Import Rates Step 4 (MDNY)

Please confirm that the information below is correct before pushing Import.

Regions	Plans
Aetna NY - Region 1	EMPNY003 EMPNY004 EMPNY005 EMPNY008 EMPNY009 EMPNY010 EMPNY011 EMPNY012 EMPNY013 EMPNY014 EMPNY015 EMPNY016 EMPNY017 EMPNY018
Mid-Hudson	EMPNY003 EMPNY004 EMPNY005 EMPNY008 EMPNY009 EMPNY010

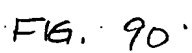
State:

Policy Type:

Carrier Status:

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FIG. 89



3280

Value Benefits Insurance Agency, Inc. - Microsoft Internet Explorer

http://Web/Carriers/OC.asp

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- MEDSPAN
- MVPNY
- OTHNY
- OXFNY
 - Plans
 - Regions
 - Plan Rates
 - OE
 - Plan Docs
 - Upload
 - Edit Plan Docs
 - Tiers
- UHCNY
- VYTNV
- ST Disability
- Vision

State: Policy Type: Carrier Status:

Upload Plan Docs (OXFNY)

Upload up to 10 pdf files. Please note that this process may take several minutes.

PDF File 1:	PDF File 2:	PDF File 3:	PDF File 4:	PDF File 5:	PDF File 6:	PDF File 7:	PDF File 8:	PDF File 9:	PDF File 10:
<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>	<input type="text" value="C:\Program Files\Internet Explorer\iexplore.exe"/>
<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>	<input type="text" value="OXFNY001"/>

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FIG. 91A

Value Benefits Insurance Agency, Inc. - Microsoft Internet Explorer

http://Web/Carriers/OC.asp

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 - Plan Rates
 - OE
 - Plan Docs
 - Upload
 - Edit Plan Docs
 - Tiers
- UHCNY
- VYTNV
- ST Disability
- Vision

State: Policy Type: Carrier Status:

Edit Plan Docs (OXFNY)

Please fill out the form below and push Save when done.

Plan	Policy Type	File Name	File Path	Description	File Type	Status
OXFNY001	Medical	OXFNY001.pdf	VB1Web/carrierpdfdocs/OXFN	Summary Plan		Active
NY Freedom POS High						

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3300

FIG. 91B

2 3320

FIG. 92A

UHS - Carrier Management System - Microsoft Internet Explorer

https://Mbs3/oms/OXS.asp

Edit Plan Docs (OXFNY)

Search for plan doc(s) to edit
Plan: All

File Name	File Path	Plan	Description	Status
OXFNY001.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY001	NY Freedom POS High	Active
OXFNY002.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY002	NY Freedom POS Middle	Active
OXFNY003.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY003	NY Freedom POS Low	Active
OXFNY004.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY004	NY Freedom Select High	Active
OXFNY005.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY005	NY Freedom Select Low	Active
OXFNY006.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY006	NY Freedom Select Low	Active
OXFNY007.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY007	NY Freedom Select Low	Active
OXFNY008.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY008	NY Liberty Plan Metro	Active
OXFNY009.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY009	OXFNY009 Ben Sum	Active
OXFNY010.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY010	OXFNY010 Ben Sum	Active
OXFNY011.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY011	OXFNY011 Ben Sum	Active
OXFNY012.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY012	OXFNY012 Ben Sum	Active
OXFNY013.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	OXFNY013	OXFNY013 Ben Sum	Active

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UHS - Carrier Management System - Microsoft Internet Explorer

https://Mbs3/oms/OXS.asp

Edit Plan Docs (OXFNY)

Please fill out the form below and push Save when done.

Plan	Policy Type	File Name	File Path	Description	File Type	Status
OXFNY001	Medical	OXFNY001.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	Summary Plan	Summary Plan	Active
OXFNY002	Medical	OXFNY002.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	Summary Plan	Summary Plan	Active
OXFNY003	Medical	OXFNY003.pdf	/VBIWeb/carrierpdfdocs/OXFNY/	Summary Plan	Summary Plan	Active

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FIG. 92B

3400

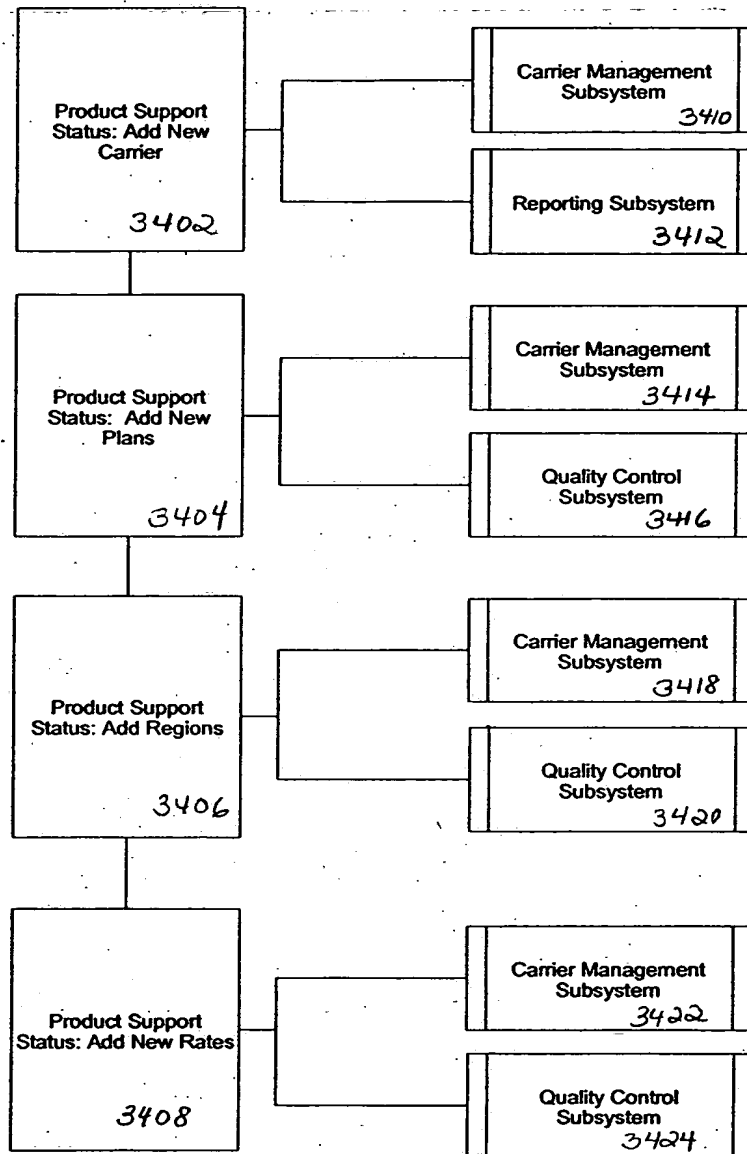


FIG. 93

3450

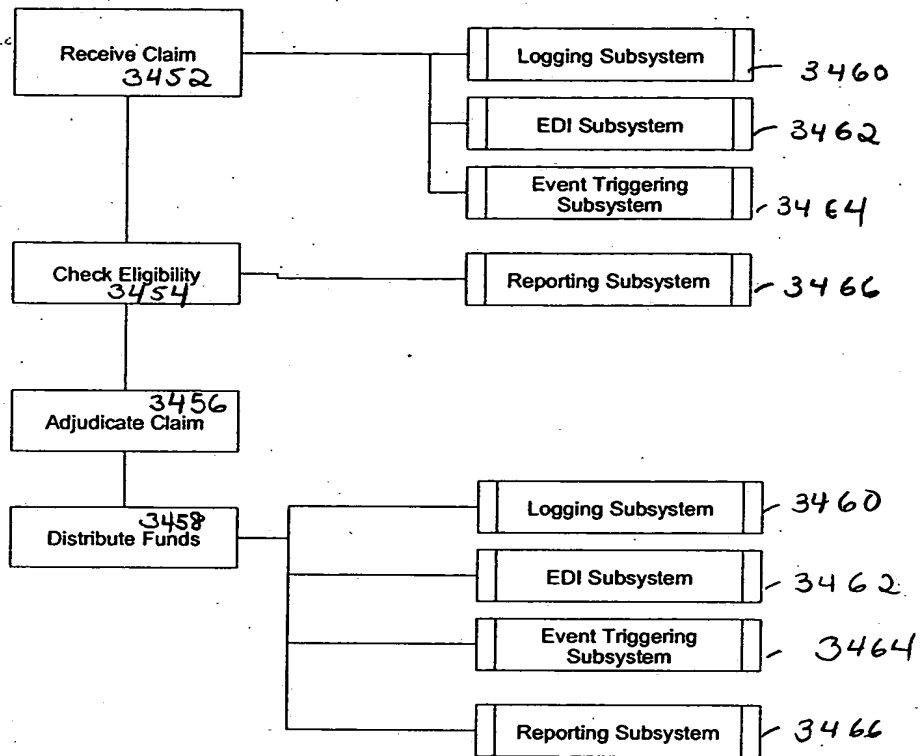


FIG. 94